

THE POLITICS OF CHANGE IN LOCAL GOVERNMENT REFORM

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THE POLITICS OF CHANGE IN LOCAL GOVERNMENT REFORM

INSTITUTE FOR LOCAL SELF GOVERNMENT

Hotel Claremont Building
Berkeley, California 94705

PREFACE

Entitling this report "The Politics of Change in Local Government Reform" we are conscious of the usefulness and the importance of defining the boundaries that we have set in our discussion on this topic. The purpose of this report is not to present an exhaustive description of contemporary political change in local governments throughout the State of California but rather to begin tentatively to visualize the process of change, that is, the operant mechanisms to change events in local government.

We have concentrated on why change happens and how change is accomplished because we are directing this study at public administrators who are problem solvers and need a design for action. Such administrators are raising fundamental questions that are basic to reform efforts. They are asking such questions as why change takes place; is local government too inflexible, the law so complex and the barriers so immense that only gifted and unusual politicians can cause change to occur? (In 1970, the California Council on Intergovernmental Relations completed a study entitled "The Allocation of Public Service Responsibility." Much can be said about the theory presented in this document. However, a number of key local government officials made a very specific request which is relevant. These officials, including a number of the Board of Directors of the League of California Cities and the County Supervisors' Association and several city managers and county administrative officers, asked that rather

than a broad study, the Council should develop a methodology concerning just how such a reallocation should take place, find out what is going on and seek the answers of what exactly are the politics of change).

We are, then, trying to respond to these queries and our own perception of the need for answers to some of these questions. Past and existing problems in local government are cited in the body of the report; the question of a climate for change is viewed and based upon our findings from the statewide survey we conducted among local government officials, the interviews we had with some of these individuals and the documents we studied, components of a change strategy are given. Furthermore, the role of the change agent or initiator in the process of the politics of change is suggested because the authors feel that this character's behavior is vital to a successful outcome in the link of events.

We have included three case studies on consolidation efforts in San Diego, Contra Costa and Sacramento Counties. We have chosen to explore in depth the topic of consolidation in our discussion of politics of change because consolidation is a highly visible reform effort that is occurring throughout the State of California at the present time. We hope that the case studies broaden the report's scheme. They are intended to be operational lessons which illustrate the politics of change at work in three geographical areas in the state. While these cases are not necessarily proposed as models, we realize that there is a plethora of problems in local government which create a separate reality for each

community (i.e., their style in the change effort will be based on their special needs and institutional arrangements). We believe that they are useful because these are the experiences of successful and unsuccessful administrators and elected officials throughout the state. The conclusions of the report are a result of talking with these persons.

Finally, our report tries to be objective. Put in another way, we do not assume any stance. We do not advocate change or restructuring of any kind. What a community does or plans to do should remain up to the jurisdiction's leadership based on the unique facts of the community. We do feel, however, that it is timely to study in practical form the ways in which change occurs when it does. Techniques of change and discussion of these techniques lag behind techniques of government. In this examination of change on the level of local government we summarize our findings based on our investigation.

RONALD B. FRANKUM
Project Director

VIGO G. NIELSEN, JR.
Assistant Project Director

FOREWORD

This report was authorized and compiled under a contract dated July 1, 1972, between the Office of Intergovernment Management, State of California, and the Institute for Local Self Government, Berkeley, California.

In general, the Project Director, Mr. Ronald B. Frankum, and the Assistant Project Director, Mr. Vigo G. Nielsen, Jr., conducted this study in coordination with the staff of the Council of Intergovernment Relations and with the Governor's office, which was initiating a program for the study of restructuring of local government.

This study, following previous C.I.R. activities, is part of a statewide undertaking to modernize and improve California local government, increase its responsiveness, efficiency and economy.

This particular report, using documented case material, focuses on the process---"How to"---by which political and administrative leadership is employed to bring about reallocation and reorganization.

Under the contract, the investigators were to provide the necessary "real world" insights into what happens to bring about change in local governmental structures. The investigators were not charged with providing an exhaustive analysis but, rather, to find, examine and document the practical methodology of change.

The project was performed under the general direction of Randy H. Hamilton, Ph.D., former Executive Director of the Institute, and the final report was edited by its present Executive Director.

January 31, 1974

John C. Houlihan
Executive Director

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PREFACE

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CHAPTER ONE

REALISMS OF LOCAL GOVERNMENT REFORM

In the more recent years prior to World War II, California enjoyed a local government system that generally seemed rational and responsible. The postwar years saw the phenomenal growth, not only of the state's population, but of government machinery on all levels. There was also greater external influence on local government by the federal and state governments. With the change in the system created by these and other factors, California officials attempted to avoid what they considered errors of local government on the eastern seaboard. To a large extent, they were successful; California's local governments are characteristically less partisan; there are city managers in California and strong mayors do not dominate local government; there are no ward or district elections; the merit system is favored over patronage and there are state controls that constantly emphasize that the city is the creature of the state.

Despite this effort and the concurrent unique quality of California local government, a policy which is still undergoing change, this sector of government has not been spared criticism in recent years for its shortcomings. The charge has been raised that the many levels of government, local government among this collection, are becoming functionally more alike. Furthermore, they increasingly provide for indirectly accountable bodies and the number of special districts has grown profusely. On a statewide

basis no general plan of governmental organization has been devised, no systematic procedures are being developed and no criteria for governmental change has been formulated for such development.

In the past, it was relatively easy to establish new local units through municipal corporations and district formations. California was growing and there was space to grow. Now, combining cities with one another and effecting interdistrict and intercounty consolidations has become more difficult, if not impossible. For example, there are only two instances, in recent history, of city level consolidation and only one other is presently being considered.

No intercounty consolidations have ever taken place, and urban development has far outrun municipal annexations. Densely settled unincorporated areas have been able to avoid attempts by cities to bring them within their boundaries, and some cities have refused to make what they consider to be "uneconomical" annexations. Problems common to cities and neighboring fringes have continued, and some unincorporated urban areas have developed into tax havens which avoid sharing their financial wealth. Attempts in the state legislature to change the unfair, cumbersome annexation laws have met with little success. A harmful result of this existing local government pattern (often overlapping, incoherent and weak) is decreased public control and accountability. Citizens, whom government serves, have enough difficulty keeping abreast of the news of national, state and local governments but the proliferation of the number of local units has made their

civic task almost impossible. The number of governmental agencies in a single community baffles even the most knowledgeable constituents, and sifting through the barrage of continually changing information provided by these agencies is a formidable citizen's assignment. Furthermore, if the government structure is publicly remote, as may be the case when governing boards consist entirely of persons appointed to those positions, this problem of communication worsens.

The current local government maze also contributes to broad differences between service needs and financial resources. Not only are these services and financial disparities unreasonable, but deficiencies in services and regulation sometimes burst out of the poorer areas and produce territorially wide-range problems.

Philosophically, state and federal governments can be blamed for the failure of local governments to reorganize and work out their mutual problems. Many state and federal policies have had unfortunate effects on local governments. They have divided responsibilities among many jurisdictions, have made the single-purpose special districts potentially the most flexible solution to areawide problems; and have increased the social and economic disparity among local units in metropolitan areas or have required the state legislature's imposition of a "single state agency" which fragments administration. Despite the propensity of each federal department to set up its own local counterpart, some federal legislation and administrative regulations focus on the need for general purpose local government and the formation of areawide planning and implementing jurisdictions.

Although no contemporary major planned restructuring of local government has occurred in California, there are tools and devices available which allow reorganization to take place. One example is the Local Agency Formation Commission (hereinafter called "LAFCO") which was established in 1965 in each county. The Commission may approve or deny the proposed formation, dissolution or change in boundaries of cities and special districts. Recent legislature has directed these agencies to determine spheres of influence for each government in the county and to establish a comprehensive plan of local governmental structure. Still, no Commission has yet to attempt the latter plan although some profess to be in the process of implementing the directive.

The District Reorganization Act of 1965 is another constructive device. It deals primarily with special districts. Joint Power Agreements have been used throughout the state by local government units to accomplish temporary solutions and better coordination between units of government.

Other reforms which affect local government are multifarious. These reforms may be as broad as a sweeping change caused by a constitutional convention or as small as a constructive administrative reorganization within a city department. In between, there are major administrative reorganizations within cities and counties, dissolution of similar functional jurisdictions, some major city-county consolidations and even talk of new forms of government. The fact is that reform in local government is occurring, and while much of the criticism directed at governments' shortcomings is valid, critics who maintain that these structures are stagnant are far from

reality. Local government is involved in a constant movement of change, responding to the continuing pressure for such change. In one city the change may be more street lighting to deter crime. Another city may be providing more park space for recreational purposes and still another may be aiming at a reduction in taxes even if it means curtailing some major governmental services.

Nevertheless, while it is demonstrably true that reform and change are taking place at the local government level, it is, in short, equally true that the demand for change and reform is not slackening. The challenge that these demands implies faces administrators, and the manner in which these persons choose to react to them will, in large part, either aggravate or ameliorate conditions.

What often causes setback in a determined effort to produce change are the factors centered around a lack of understanding about how change occurs and fallacious notions about change phenomena in general. The present study revealed that individuals who are confronted by problems which require a change solution frequently launch into such complex issues by studying only the objective facts. While such an examination is undoubtedly necessary, it often results merely in a statement of the problem that does not explicitly address methods or strategies for solving that problem. The need for such a discussion is only too obvious. Change strategy is an area in which the practitioner must be concentrating a sizable portion of his creativity, energy and hard work. Hopefully, this report, which looks at the question of strategy as well as the whole gamut of politics of change on the local government level, will be useful to people who are working in the change arena.

An example of a typical everyday instance of the politics of change helps provide a clearer picture of the ramifications of a change effort and the difficulties inherent in it.

CASE STUDY #1

"My name is N. A. I was a public administrator here in California. All of my life I've been an activist and am known by my contemporaries as a hardworking, 70-hour-a-week administrator. In recent years, my jurisdiction was constantly faced with budget crises because of the somewhat static revenue base and growing demands for new services. Not long ago the budget crunch became critical. Being a student of public administration, I've always tried to keep up on new management concepts, even though my reading pile is a year behind. With the fiscal problem being what it was, I did what I felt had to be done ... I sat down and brainstormed what to do. After a couple of days, the answer came like a brilliant flash. The solution that was available would be tricky yet it would not only improve the level of services but it would save some dollars. There was no doubt that if it worked, my career would be enhanced. Besides the plan was so overwhelmingly logical that no person in his right mind could oppose it. I called in my secretary and dictated a memo to the council. It was detailed and professional. In fact, I pride myself that I am a professional public administrator and that I'm not a politician. I only work for them. 'Let them worry about the politics,' I always say. The memo was a masterpiece. I also knew that it was probably a good idea that each of the council get an advance copy and I sent one to, our attorney.

What was in the memo? It involved a reorganization of three of my departments and a concerted effort to pursue a regional cooperative effort to set up a centralized multi-jurisdictional clearinghouse. Cost savings seemed real and the level of services seemed far better. Even as I read the final draft of the memo, I was more convinced than ever that this would solve the problem. Out went the memo.

My principal aide, Junior Administrator, was called and I laid it to him. He stared at me for a while, then said, 'Well, it sounds fantastic ... it'll be a little rough to pull off but it's bound to work ... I think.' That should have tipped me off. I put Junior Administrator to work getting a couple of

maps and a chart and asked him to get the budget officer to check on some figures. Then I relaxed. Just like most crises, I knew that there would be another tomorrow, so I returned to my cluttered calendar. Next week the council met.

They seemed happy for a while. Then the questions came: 'But, N. A., are you sure that this will save the money and still increase the level of services? ... 'What is the business community going to think?' ... 'You know the newspaper is very critical of such consolidations ... they still believe in conspiracy and such' ... 'By the way, won't this reduce our span of control? ... we really don't want to give up too much of our control' ... then the cruncher: 'I like the idea, but it needs study ... let's take it under submission ... do I hear a second?'... 'Second.'

Within two weeks the newspaper had editorialized against the concept and even called me a radical. A group of citizens formed and started a petition to recall the council and to top it off, my aide, Junior Administrator, said, 'Well, boss, it's a great idea ... but let's drop it' ... The bubble burst. I dropped the idea. The budget officer found a way to move some money around on the books and the crunch passed. I never did like being a public administrator anyway. There was so much apathy, no one wanted to change; the laws were so complex that they stopped anything from happening."

This story as related by an unsuccessful instigator for change is admittedly oversimplified. Yet, it is significant because instances similar to the one related here happened, in substance, at least ten times last year in California. Failure in promoting and implementing change is not an untypical experience. It is something that most public administrators suffer at least once in their careers.

Compare it with a second case study where the instigator typifies another kind of behavior and, consequently, faces a different outcome in his change effort.

CASE STUDY #2

"My name is S. A. My community had been facing considerable problem meeting the demand for new services and was at the end of the rope when it came to new revenues. I knew there was a real fiscal crisis brewing. It wasn't far off. One day, I just sat down and worked up a solution. That solution involved, among other things, a reorganization of two single purpose districts into one larger multi-purpose district covering what amounted to a well defined town that was just too small to incorporate. Since we're short on time for this interview today, let me tell you about this reorganization effort and it will emphasize how I operate. *(At this point this story differs from the previous one. Unlike the instigator in the preceding case study, S. A. is a successful instigator.)*

I took my notes into the back room and began analyzing the barrier that I was going to face in selling this thing. I have a sort of checklist that I follow. It varies each time, but generally most of the problem areas are isolated early. The first part looks something like this:

- A statement of the problem
- Examples of how others have solved the problem
- A new organization chart (only a rough drawing)
- Facility changes necessary
- Personnel changes required
- Estimates of potential dollars saved, if any
- Estimates of improved services, if any
- Magnitude of the problem
- Will a study be necessary to verify my facts?
- New symbolisms for acceptance I might use
- Will it require a change in our ordinance or a state law?
- What are the principles that I can expect my council to act upon?
- What's likely to happen if I am successful?

Then I stopped and decided whether or not it was really such a good idea and whether it would really be an improvement. My training as a professional public administrator gave me the clue that not only was it a good idea, but it would make me look very good when I moved on. I decided that it was a good idea.

Next, I put together what I call my 'secrets of the crusade.' I found out the hard way that, even though I worked for elected officials, I had to be very sensitive to the politics of my community. I wrote a list something like this which asked the following question: 'Who are going to be the players in the crusade?'

- My staff--a list of the key individuals who will work on the project from beginning to end
- The governing boards--each listed separately
- Our attorney
- Others who would care:
 - The public agencies union
 - The business community
 - The four main leaders of the community, otherwise known as the 'blue bloods'
 - Special interest groups who would stand to gain; those who would stand to lose
 - The news media, including the best reporter for the local newspaper and the local radio and TV managers who controlled editorials.

Then I took the first list and began to cross-reference the people involved. People are, in my opinion, the biggest barriers to change. I tried to divide in my own way those whom I could count on for support, those who would be passive and those who would oppose. I asked myself how I could neutralize the opposition.

Then I took the notes, put them in my desk and went home to talk to my confessor, my wife. I knew that the problem could wait a bit. It wouldn't go away. A couple of days later I was convinced that it was an overwhelmingly logical argument. It was also politically possible. It was only then that I brought in a couple of close aides. We spent the better part of the day just deciding whether the idea would sell and if we could get the Council to agree. It was like putting a campaign together. We very carefully worked up the data that we were going to have to put to the Council and worked up a checklist of who we were going to tell about the idea and when we were going to tell them. We actually put the whole thing on a chart. We used it to make sure that we were on schedule even though we had to change the chart four or five times. The strategy we developed had to be modified when it proved that it wasn't working.

At first we tried to get the board of one of the independent districts to spearhead the drive for reorganization. They were to initiate the proposal, inform the public and spark a campaign for change. It backfired, however. People tried to read something into their actions. We shifted to a new and more effective strategy and used the truly concerned leading citizens of the community to initiate the change. We provided all of the technical expertise they needed and I worked in the background. They made it a crusade. They scheduled public meetings. A strong leader emerged who believed the change was very important (he was not one of the old guard).

If I had to evaluate our success I'd have to say it was because we worked out the bugs, as many as we could, at an early stage in the effort. The barrier that I worried about most, those district board members who opposed the reorganization, turned out to be in our favor. These persons caused animosity. Our citizens talked with each of the members and sort of shamed them out of their reluctance to give up the socially prestigious board memberships and do what we proved to be in the public interest. Let me say again: you've got to get those key local people involved and work up a sort of campaign. We in the government just couldn't do the job by ourselves. Even though we know we're right ... seems people just turn off if they suspect that government (city, county, state or federal) is pushing ... but if you get the public behind you, it's another story.

By the way, we won."

This case study illustrates a successful change effort where the instigator planned and mixed and phased strategies with an existing climate for change favoring his work. Later, in the report, some elements characterizing successful change efforts will be presented in detail, but it must be observed here that the instigator, in this second case study, employed several of these elements in his own fashion and according to needs he perceived.

In this report change carries a commonplace definition: it is synonymous with transformation or alteration. On the local

government scene, it refers generally to a new development in the content or shape of the policy which marks a difference.

Change is regarded by many as growth and by others as something to be avoided when at all possible. Despite how change is viewed, it can be stated that this phenomenon is usually slow to develop. Based on findings in the research conducted during the course of this study, it became very apparent that for even a small change to occur, there must be a climate for change. The expression "climate for change" has a self-evident connotation. This condition describes a combination of particular, existing factors which are conducive to change. While it is sometimes difficult to pinpoint the conditions underlying a climate for change, some factors were mentioned repeatedly by instigators. Some of these factors can be grouped together and enumerated. Although not a definitive list or a series of clearly separate categories, there is a climate for change when one of the following exists:

1. Collapse - when services become so unwieldy, overlapping and inefficient that they come under direct attack by citizens (e.g., riot or crime in the streets)
2. Crisis - a confrontation by community and governmental leaders with acute, harmful reality (e.g., a discrediting of schools or a threatened significant imbalance of the budget)
3. Catastrophe - a major physical event that draws public attention to the failure of the public agency or agencies involved to provide anticipated services (e.g., in the event of forest fire, earthquake or flood)
4. Corruption - a discrediting of officials in a local public agency (e.g., Jacksonville, Florida before city-county consolidation)
5. Cost and Efficiency - when the cost of government is beyond revenue sources and the level of services will suffer unless a solution is found; when a higher level of services is demanded.

The first four categories are of a special nature and often precipitate a climate for change rapidly. In the case of a collapse, crisis, catastrophe or corruption, an immediate solution is usually required and sought. The governmental agencies, and the community at large, placed in a position of responding, do so under considerable pressure; there is no time for endless studies. Frequently, in the midst of shock and pressure, a stop-gap measure is adopted as a solution to the problem without prior in-depth evaluation to determine whether or not the new scheme will work. The problem at hand is relieved and the persons who attended to it move back into the quieter arena of other regularly occurring problems and everyday business matters. The solution applied to the problem may be reviewed periodically. It may be replaced with another modification or it may become institutionalized.

Such crisis situations obviously require some "how to" expertise but, generally, the event itself is of sufficient compelling force to promote change, leaving as the principal question the choice of solution. None of the foregoing situations is so unlikely as to be dismissed but, since it is the last category, cost and efficiency, that appears to characterize the common present situation in California, the investigators have chosen to respond to this area in some detail. Preoccupation with the high cost of government, the desire for greater efficiency, and more adequate, responsive services constitute such an inclusive category as to require placing virtually all that was happening in California under that category.

Some Examples of Change Occurring in California Today

Anyone who believes that the business of local government is static and changeless is unaware of the many changes occurring in this polity. Local government is regularly on the firing line responding to demands for change on a continuing basis.

To determine the extent of this change, a short questionnaire was sent out to key local officials throughout the state. At least one elected official or an executive officer of the state's Local Agency Formation Commissions, a random sampling of city officials and members of the Board of Directors, or their representatives, of both the League of California Cities and the County Supervisors Associations were asked to comment in the questionnaire on recent, locally initiated activities which involved restructuring of local government. Responses indicated that, at the grass roots level, local government is taking incremental action toward gradual change. The types of change are diverse, varying from as major a change as significant charter revision to the garden variety of functional consolidations. The changes do not ordinarily reflect dramatic "front page" type of reform effort which is often exhorted from the political stump. They are calculated, thorough and quietly implemented endeavors. There are numerous examples of small functional consolidations which took place in the last two or three years. Some of these changes involved such governmental services as libraries, animal control, data processing, joint sewer projects, expenditure control, more responsive representation, improved service, elimina-

tion of obsolete programs, accountability, and new joint power efforts to coordinate planning on a countywide or regional level. Within jurisdictions, long overdue reorganizations have occurred to reduce the span of control exercised by the legislative bodies and local managers. Departments, long independent and unresponsive, have been merged and revamped to meet new demands.

It is highly significant that among the jurisdictions which responded to the questionnaire, 80% had either restructured, reorganized or modernized their management structures in some manner in the very recent past. The motivating factor most frequently mentioned by instigators of change at the local level was the cost of government and the belief that a better management system would save money and deliver better quality services.

Is There a Climate for Statewide Change in California?

This question can be answered by reviewing the five types of pressures that create a climate for change. Of these, only cost and efficiency was found to be universally present. In the case of efficiency, there are strong desires in the ranks of local public officials to modernize government and to provide a better level of services. This desire is not surprising. California has long been a leader in the field of professional public administration, the development of modern local management systems and innovative concepts of management. Throughout the state, change has continued to keep California ahead of the nation in new concepts and ideas.

A look at the successful restructuring schemes also shows that the theme of cost of government has caught the attention of

the decision maker at the local level. Recent "tax reform" efforts by the state, and general revenue sharing by the federal government, pumped new money into the mainstream of local government finance. Despite the horror stories circulated by opponents to Presidential impoundment of funds, local governments are not in the same frenzy of trying to solve fiscal crises as they were in 1969 and 1970. These entities are not highly solvent, but there is enough money for substantial pay raises to relieve existing inequities and there are even some large scale capital expenditure programs being pushed throughout the state.

State Senate Bill 90 placed a lid on tax increases by local governments which prevents a build-up of pressure. The lack of growing pressure to reduce the cost of government, as a result of the passage of S. B. 90, limiting the level of taxation to be imposed by local governments has, perhaps, eliminated cost of government as a major factor creating a climate of change. This, of course, will require a thorough, cautious analysis by economic pundits, but it is an intriguing possibility. If this is the case, then only the desire for more efficient government remains, for the time being, the factor which fosters the climate for change in local government in California.

Statewide local government reform seems to have been begun at a serious level when Governor Ronald Reagan launched his statewide effort which contemplates a fairly comprehensive examination of the issue. In the Governor's off-the-cuff remarks at the annual Sacramento Host breakfast in September, 1972, he said he had a "dream" when California local government would be more visible

and accountable. These thoughts were echoed a month later by the Lieutenant Governor who outlined some of the areas to be considered. They included, in part, such sweeping issues as county consolidation, city-county consolidation, major boundary changes, redrawing county boundaries, reassigning revenue sources among levels of government and ten other recommendations. To justify this significant statewide reform effort, it was emphasized that there are over twenty million people in the State of California with 18,000 elected officials, 58 counties, 409 cities, 1,140 school districts, 2,500 special districts, over 100 different sets of sub-state administrative areas and 1,400 domestic federal grant-in-aid programs. There has been some editorial comment on this statewide effort, notably in the Los Angeles Times which, on November 19, 1972, said:

"... such a sweeping look at local government is long overdue. What served us well in the past has become cumbersome. Officials at all levels of local government should cooperate in the move for reform ..."

Certain groups have already heeded this call to respond. "Action Committees", formed by the League of California Cities and the County Supervisors' Association of California, evidence concern and a desire to improve. The Council on Intergovernmental Relations has held a series of hearings to determine the major problem areas.

While this is certainly an expression of desire, it falls far short of determining the climate necessary for sweeping statewide reform. The research conducted for this study forced the investigators to conclude that, as of mid-1973, there was no strong

support for statewide local government reform. Too many local "instigators for modernization" are at work and their local commitments and concerns tend to move them away from contributing wholeheartedly to any statewide drive. No pressure seems to be building up which would cause significant change in line with the state plan, such as consolidation of counties or re-drawing of county lines. Practically speaking, the effort at the local level is acting as a safety valve on a high pressure steam engine. While the power is potentially there, the wheels are not moving.

It is logical to ask why this is happening. Some possibilities could be posed. One of these takes into account the fact at both the state and local level, California's long history of "open" government, strong civil service and merit employment and considerable statewide citizen interest have made it extremely difficult for malfunctioning and disruption to occur. While some contend that local government has become so complex, so overlapping and so inefficient that it cannot meet new demands, the facts speak somewhat differently. Local government is continually meeting the problems implicit here, admittedly on a stopgap basis in many cases, but, again, each effort and each change which occurs opens that safety valve which prevents the pressure from building up. Nevertheless, these questions remain: What happens when a new idea for better management is generated on the local level? Why do some excellent proposals never reach the implementation stage?

Often public administrators and elected officials see the need for a better organization pattern and understand the benefits that can be derived from such changes as a move to the agency system of county management, a reorganization of fire services, or the installation of a cost accounting system for better budget priority setting. They burst out of the doors of their offices and announce their plans enthusiastically, only to realize failure in the change effort. Excuses vary: "We just didn't have the support of the press"; "Before I knew it everyone was asking whether or not I was a radical"; "It would have cut the growth in our expenditures but I just couldn't prove that we would save money"; "No one cared"; "Public apathy was absolutely amazing"; "We were so overwhelmingly correct in what we were trying to do, but the council turned us down four to one . . . why, I really don't know".

The key to the problem seems to lie in the fact that a climate for change stimulated by problems of cost and efficiency is apparently not enough, per se, to cause change to occur. There is an additional element that is seldom discussed but is, nevertheless, a most critical requirement. That element is response. An instigator who sees change as necessary and finds the issues of cost and efficiency supporting the climate for change in his locality needs to carry out a well executed campaign.

The campaign has many shapes, yet, no matter how large the planned change may be, every campaign contains certain similar characteristics. The following discussion treats these characteristics, offering an orientation for action which may aid change agents in achieving successful closure on a particular change effort.

The Political Campaign for Change

This research, conducted statewide, indicated that a campaign is essential and important if change is to take place. The campaign, a change strategy described by certain political behavior (bargaining, negotiation, mild coercion and clash within accepted social norms), can be broken down into basic areas. The practitioner may use more or fewer of the elements than are mentioned here, depending upon his own perception of the situation.

Contemplation

This is the planning stage and the initiation of action in a campaign for change. In every successful restructuring or reorganization encountered in the research project, the instigator was found to have gone through a contemplative process, either intuitively or consciously gameplanning his campaign. In some cases the instigator was like the cat who always landed on his feet. He could sense what was necessary to get the private and public agencies and the general citizenry to accept his "better government" concept. However, in most cases this wasn't so because many public administrators and elected officials are not intuitive politicians. The successful instigators for change sat down and worked out the gameplan. Perhaps the best message for the reader who has a "better government" concept is not just to assume that he is an agile cat.

The planning state should not be underestimated in importance. At the onset of a campaign, the instigator must develop a full appreciation of the task at hand. Fundamental questions must be asked. Some of the more critical questions are:

- Who are the principal actors (i.e., those in favor of the change effort and those opposed to the change effort)? What are their attitudes? How can these individuals or groups of individuals be influenced?
- What are the substantive problems involved in procuring change (resources, resistance, complexity, etc.)?
- What are the characteristics of the community?
- What is the potential for public support?
- What is the history of local change effort? Are there precedents for this change action? In past efforts, what were the causes of success and failure?
- What is the specific goal of the change effort? Are there secondary goals? Is goal compromise possible?
- What is the organizational context within which the instigator and his co-workers are operating? Is there support from this setting for the change goal?
- Is there a climate for change? Who or what is creating this climate?

With answers to these questions carefully assessed, the instigator is in a position to lay out his strategy and to begin implementing it step by step. Without understanding that motivation alone does not provide change, and without initial study of the issues that surround the change effort, the public official who is trying to improve or modernize his jurisdiction is certain to become frustrated with his effort and to react by burying himself in trivia and technical inconsequences.

Cadence

It has been said that 90% of the art of public administration is timing. The proper political moment is an important as the right change proposal. Special attention should be given to the issue of timing, since success of the effort may hinge, not upon the merits of the plan, but whether there is, in fact, a climate for change at the time the plan is introduced. Choosing a year when other special events are not competing for

the citizens' attention, waiting until a key opponent is retiring, or creating diversionary tactics to confuse and disorient opponents at the right moment are three examples of how successful instigators, in the study's findings, perceived the kind of climate needed for change and correctly timed their campaigns.

Constructing a Nucleus (The Action System)

The selection of a nucleus of co-workers and supporters must occur concurrently with initial planning activities. Including community figures in the campaign is essential, for it is these individuals who supply the ingredients of leadership, participation and expertise for the community and lend legitimacy and sponsorship to the campaign for change. The bigger the restructuring effort the more important it is to have a nucleus of business, civic and community leadership on board from the beginning. The instigator who cannot identify and assemble these figures should canvass the community to determine who does exercise sufficient direct or indirect influence to be effective in the campaign.

It is particularly important to include representatives in the state legislature, if possible, since they will sponsor enabling legislation should the restructuring effort require it. Initial opposition, or even neutrality, on their part casts a pall upon the project at the outset.

Educating the Community

Since there is natural resistance to change, the instigator must be prepared to sell the change issue to the community. In planning an education program for the community and public officials,

it is important to realize that the problems, issues and unanswered questions associated with the change will come quickly to the fore. The instigator must concentrate on this issue. One of the fastest ways to lose momentum, if not the whole campaign, is to fail to maintain concentration on the prominent change issue. The opposition quickly throws up the usual strawmen of dire prospects and false fears. If reformers discuss these other issues, attention will be diverted, energies will be misused, and they will fall back on the defensive. It is a natural temptation to respond to each and every question but it is equally necessary to insure that the effort is not sidetracked by distracting questions.

As much time, effort, money and skill should be devoted to the preparation and execution of this part of the overall campaign as is given to the change proposal itself. It is important to move supporters to that point where they identify with the problem and consider the proposed solution vital to their own interests as well as to the interests of the broader community. Some of the following means can be employed to elicit consciousness and solidarity on the part of groups of supporters:

- Stir up sectional animosity
- Parade a successful precedent before the supporters to give them a feeling of confidence. When people are educated to appreciate the necessity of change and the rewards that change brings, presenting the change proposal at hand will be the next feasible step.
- Make the change a positive sounding change (i.e., a positive ultimatum).

In the use of tactics such as these it is incumbent upon the instigator and his co-workers to remember that this is a politically

sensitive area. People demand and deserve an honest presentation of the issue in a straightforward manner. The past may not produce the best results for influencing today's public. Furthermore, each community is unique, and techniques that worked in Santa Barbara or Tulare may not be effective elsewhere. It is of singular importance to understand the nature of the community in which the campaign is being conducted.

Communication

The importance of effective communications and public relations techniques must be built into an effective reform campaign. Good promotional programs present a picture of knowledge, responsibility and prestige. In Columbus-Muscogee, for example, city-county consolidation was achieved in less than a year with the assistance of a public relations effort. A 15 member citizens' charter commission was appointed in May, 1969, with the responsibility for writing the charter for a single county-wide government. With the assistance of a public relations firm, the commission completed its work by the following April and sent the new charter to the voters. At this time, a citizens' publicity steering committee mounted an intensive promotional and educational campaign for the new charter. A variety of promotional devices were used, including extensive precinct organization work and neighborhood campaigns, which practically guaranteed passage of the new project.

Selection and use of news media is crucial in promoting support for a new proposal. While a variety of media studies failed to single out any one medium as most effective, each

vehicle can be of some assistance. Many campaigners have tried surveying the community early in order to determine how members of the public gained information about the proposal in the works. Such a survey may help select the most effective approach. Media effectiveness varies with the level of education. The higher the general education level of the community, the greater the reliance upon the printed word. TV should not be utilized as a substitute for a speech or an article. Nevertheless, television coverage, if designed well, can be incorporated into the public relations facet of the overall campaign. Film strips, movies, or other visual techniques with voice in the background can be employed on TV. If a live public lecture or forum is employed, a short, concise, simple presentation can be supported with graphic illustrations such as charts or filmstrips. Written efforts should likewise be brief and in the form of clear, understandable and easily grasped sets of recommendations for action. Intriguing, comprehensible and rational recommendations, whatever the medium, have the effect of making change itself appear reasonable.

It is also important that the style, as well as the medium, be appropriate. Avoid the "promised land" syndrome. Do not promise more than the change plan can deliver. The public is never convinced that there are quick, simple solutions to today's problems. A moderate recognition that not all the answers are known and that mistakes are conceivable carries more weight than hysterical claims or threats of imminent disaster. In community discussions, provide the opportunity for individuals to express their opinions, to state their problems and to articu-

late their goals. Relate their concerns to the project being proposed. Use the influence and credibility of respected public figures. Let other community leaders, especially those in tune with a particular target audience, carry the message.

Applying these thoughts, written documents should be developed with the public ear in mind and not formulated for internal consumption. Accordingly, the following suggestions are made:

- Start with the "Big Picture" and then proceed step by step with an explanation of the issue
- Follow recipe writing techniques, making sure that the components of the change proposal are presented logically in sequential order
- Flag the instructions and insure that the summary is read
- Use the components of programmed learning and make the report look less formidable than it is
- Avoid technical and trade expressions. Instead, give the information in language with which people can relate.

In summary, simple, direct and realistic communications delivered through media with which the public can identify and recognize are indispensable methods of involving community support and galvanizing public opinion.

BARRIERS

No action program, no matter how meritorious its goal, creative its strategy or inspired its presentation, can hope to achieve maximum success without careful consideration of the numerous institutional barriers to reform. Barriers embedded in the law, in vested interest groups, in the minds of the public and in the dissemination of information, all must be systematically assessed and evaluated by the instigator and his nucleus. (Following is

a discussion of a representative, but by no means exhaustive, group of barriers which emerged from this study.)

1. Legal Barriers

The most significant legal obstacles to change are usually found in state or local statutes affecting government organization. In cases where additional enabling or exempting legislation is required, the District Reorganization Act of 1965 and the Joint Powers Act of 1911, which have codified some reform procedures, should be studied and digested. In spite of the complexity of laws and administrative procedures surrounding them, reformers and citizens alike should master and overcome them. With the exception of enabling type legislation, government reorganization efforts should be able to proceed without major legislative alterations.

2. Vested Interests

Opposition to reform plans can be expected from those who feel that they might suffer personally in some way from their adoption. Those whose position might be eliminated or downgraded, whose salary or authority might be diminished, even those who have merely working contacts with some who might be threatened, cannot be expected to wish unqualified success to reform efforts. Public officials, such as the fire chief in a district or non-paid commissioners on a board to be reorganized, consolidated, or annexed, must be expected to oppose the plan. Elected officials, with no specific personal interest in the plan, may fear that the plan's

unpopularity will harm their own reelection chances. All of these potential opponents are respected community leaders. Their opposition to the reform effort can be potentially very harmful.

3. Information Barriers

Assuming that the reform in a bona fide proposal will, in fact, reduce costs and/or increase efficiency, there still may exist an information barrier because available data is too incomplete to substantiate the proposed reform beyond reproach. Many reformers will back away from their change stance after learning that statistics are not obtainable to verify the efficiency of their proposed reform. Another barrier results from the belief that reform has to be based upon written information and that the campaign is lost if substantial doubt arises over the validity of some report.

4. Psychological Barriers

There is an endless list of psychological barriers which confront reformers during a change effort campaign. This list includes such traits, interests and values as tradition, symbolism, loyalty, prejudice, fear, insecurity (particularly if there is a lack of precedent) and provincialism. Many administrators tend to play down these barriers only to discover later that they were real, tangible obstacles to reform. In one community, for example, it may be very important to the residents to know and to be reassured that a fire station will remain in the same location after consolidation occurs. In another instance, the

loyalty of decision makers may be easily overlooked or underestimated. To cite an example of the significance of psychological barriers: in one case, symbolism played a major part in the reformers' pledge to retain the local city seal on the sides of new county fire trucks.

COMPROMISE

During the campaign, compromise on the change issue may have to be considered. Because of this possibility, compromise is a subject which should be contemplated before the action system becomes too committed to the terms of the change proposal. The group, instigator and co-workers, should decide what is the absolute "fall-back" position, what trade-offs are feasible and what price must be paid to insure support of certain groups or factions for the reform.

Compromise on some part of the original reform plan must often be reached to overcome a significant barrier to change. One city-county consolidation in an Eastern city had proposed that all department heads be appointed, but modified the proposal to allow for the election of a sheriff when that compromise would guarantee implementation of the whole plan. The original Contra Costa County fire consolidation was compromised to allow dual chiefs for the first two years of the consolidated district.

In summary, the instigator and his co-workers and supporters have an array of campaign tools available. Since desire for change does not by itself create change, professionals should become more knowledgeable about the existence and manipulation of these tools

when different change issues are at stake. A statement by an active businessman citizen who was interviewed by the investigators underscores the necessity of a "know-how" for change. He said:

"It is true that there are a lot of jurisdictions in California ... 409 cities, 59 counties, 5,000 schools and special districts ... so what! Until you can show the community, which is very conscious of cost accounting and running a business ... that a restructuring will do a much better job or save a lot of money ... (and that means responsible projections, not bureaucratic guesses), you're just not going to get us interested in local government reform. We are peeved at the current cumbersomeness of local government, but we know it and we will thwart any change when you can't support the unknown quantity."

Henry Schmandt enlarges the perspective of the arena in which reformers must operate with his concept of the change process:

"Redesigning the governmental structure of an urban area is essentially a political question. Every proposal for change must at some point meet the test for political acceptability, a test provided in some cases by popular referendum, in others by the legislative bodies of the units involved, and in others by the nod of approval or disapproval of party leaders. Political questions must be approached in a political manner and with political strategies ... Changes in governmental structure involve alterations in the division of powers, rewards and labors. These changes may jeopardize the positions of local officials and employees, threaten the protective control exercised by suburban units, affect the representation of different constituencies, and modify the impact of taxes and services of various groups. It is naive to expect that a reorganization proposal will possess such overwhelming logic from the standpoint of efficiency or equity that it can avoid attacks from those who perceive it as a threat to their interests ... "

Local government reform, then, is a political campaign which combines planning and contemplation, a nucleus of change,

effort, workers and supporters, comprehension and selling, education and community involvement, concentration on the issue, acence and cooperation with Sacramento as determinants in the outcome of the effort.

CHAPTER TWO

REFORM AS A CAMPAIGN

Vacuum, complexity, silence, reluctance, and occasional enthusiasm are words which, in some degree, describe the researchers' reactions upon evaluating and reporting on local government reform. With a wealth of new ideas and modern public management techniques, one might ask why so many excellent local government reform plans for cost savings and efficiency are never implemented. After a six-month study, the investigators concluded that such reforms most often fail when the instigators do not undertake a campaign which by its very nature creates a broad base of support.

Studies and case histories in overwhelming numbers analyze the deficiencies of existing local governments and the expected benefits of restructuring. However, there is a sparsity of published information and analyses which addresses the question of "How" a local government official brings about reform once agreement on the given proposal has been reached among the reformers. Consequently, local government officials and administrators have little material from which to learn the lessons and mistakes of earlier efforts. Nevertheless, some articles and reports about recent city/county consolidations are now available and professional interest about the methods used to accomplish reform is increasing. It is encouraging that one recent article, for example, focused primarily on the politics of the reorganization of Lafayette County and Lexington, Kentucky,

concluding that: "Utilizing compromise, cajolery, persuasion, great energy and just plain luck, the proponents of consolidation came forward with their plan precisely at the right time ... " At present, however, there are only a handful of these types of operational analyses and none examine reform effort situations in California (see bibliography).

The investigators therefore commenced to document and analyze selected past and present reform efforts in California to find the "How". Case study examples were selected from reforms undertaken for purposes of cost and efficiency and likely to involve a high degree of opposition. Consolidations were chosen because they are typical and exemplify reforms involving the overcoming of entrenched opposition. The decision as to whether reorganization is needed at all depends upon local evaluation. The selection of the best alternative is the responsibility of California's elected and appointed officials and the general public, in cases when the question of reorganization is put to vote.

One of the things seldom found in such a search of the "How" is any political file or permanent record. To piece together the politics of a given reform effort, it was necessary to get behind the public records which are only the tip of the political iceberg. The methodology used was in-depth interviews of those identified as key proponents, opponents and observers (the press corps and the staff of participants). In a period of six months, more than two hundred and fifty persons were interviewed, many of them repeatedly, as the investigators' understanding

increased. Most of the participants, even the few politicians who needed to cover their flanks, were eager to relate their stories in great detail. Interestingly, no two participants in a single reform effort remembered and understood the events in an identical way. A number of the individuals interviewed asked not to be quoted; the more recent the reform effort the more likely that request. The study-at-large also showed that reform efforts in progress presented less available "inside" information. Again, this seems logical since leaders were reluctant to discuss their reform endeavor before they were actually successful.

Because local government politics elude significant press coverage, they also escape public understanding or analysis. Even when available, public materials are limited to the formal records, minutes, resolutions and correspondence of government agency officials, campaign materials (if the reform involved an election) and graduate theses. Because virtually none of the twelve hundred documents investigated included insights into the reasons why decisions were made, research required constant cross-reference interviewing to provoke memories of past events and recollections of the real reasons behind decisions.

The first case study involves a restructuring (1969 to the present) of the San Diego County government. The proposed "agency system" is being implemented to improve cost and efficiency by grouping departments with a similar function under an agency administrator who reports directly to the chief administrative officer. This successful effort has required a considerable

campaign even though all departments involved were already under one governing board. The campaign did not involve the leading citizens wearing white cowboy hats as they did in Dade County, Florida. However, as the reader of this case study will see, virtually all of the factors that make up a campaign were carefully covered by the instigator.

The second case study pertains to the consolidations of fire districts in Contra Costa County (1955 to the present). It involved examples of greater complexity. To date, eight fire districts have been abolished and many consolidations are still pending.

Because no county-county consolidations have occurred in California, the investigators chose the most applicable consolidation, the current Sacramento city-county metropolitan government proposal, as the third case study.

After concluding the interviews, analyzing the documents and comparing notes, a number of conclusions were reached. The most obvious is that these successful local government reforms required a political campaign and, conversely, the reform proposals suffering a premature death were ones in which a study was submitted on its merits without a campaign to support it. Second, although each reform effort was distinctive, there were strong similarities among the successes and strong similarities among the failures. The successful campaign began with planning, a phase which included early identification and evaluation of the expected opposition barriers and early selection of proposed solutions to the most serious barriers. The defeats were usually

marked by brief all-or-nothing attempts by impatient instigators who lost interest or found themselves unable to continue to act after suffering an early setback,

Other features common to successful reform efforts were also found during the research process. Some of these include: the particular behavior of the instigator and the instigating nucleus; the types of motivation that formed the basis for the reform effort; the temporary events that improved the climate for change; the importance of labor unions; and the significance of written reports. Each of these features will be discussed briefly in the following section.

INSTIGATORS AND NUCLEUS

Successful instigators usually had long term commitments to the reform program, often remaining in the campaign stance after numerous setbacks, and at times were willing to commit many years to accomplish the reform. This dedication was especially important in restructuring attempts which required a series of steps over an extended period of time. These incremental kinds of reforms required sufficient patience on the part of the instigator to outlast certain incumbents.

Instigators who were in positions which permitted the commitment of considerable time on the reform effort were very effective. This was especially true of judges and senior staff employees, other than chief administrative officers. It was also observed that the chief administrative officers and members of Boards of Supervisors or City Councils usually had too many other

commitments and obligations to be prime instigators. There were, however, exceptions to these observations.

Instigators who envisioned themselves as catalysts or enablers and not chairmen of the reform groups were better able to retain cohesiveness within the reform effort. Honorary or figurehead chairmen were ineffective and, in almost all successful reforms, the chairman of the reform or citizens committee was an exceptionally dedicated and energetic individual.

Some certain characteristics of the nucleus around the instigators also appeared in different successful efforts. First, instigators were usually assisted by groups of individuals whose motives and dedication were not contaminated by self-interest or ideological fervor. Continuity and cohesion of the nucleus were especially important factors. Peripheral members could dissent or drop out, but the major purpose of the effort had to remain clear and the commitment to it high throughout the campaign. Second, and most importantly, effective instigators and nuclei were able to react with exceptional speed and consensus to the tactics of the opposition. When an apparently unrelated proposal to the Board of Supervisors threatened to create a harmful precedent, fast analysis, agreement on action, and a coordinated education of the Board of Supervisors might be required within one or two days. Situations like this frequently presented themselves and separated the sophisticated and experienced reformers from the politically inept ones.

MOTIVATION FOR REFORM IN CALIFORNIA

The prime motivating force for the restructurings studied in the case histories was cost and efficiency. It was observed, however, that successful reform efforts usually involved multiple collateral and supplemental improvements that gave greater weight to the proposal. In a successful fire district consolidation, reformers argued that not only would taxes decrease, but that insurance rates would also go down and equipment and training for the new department would be improved. In other words, the reformers depicted that benefits would be realized by all. This multiplicity of benefits provided a wide base of support and allowed the reformers to approach various groups with different arguments and promises.

Numerous benefits attached to a reform effort facilitated the ability of reformers to compromise the original plan, if necessary to win over certain opponents. To cite an example of trade-offs, one consolidation resulted in retention of dual fire chiefs for the first two years, decreasing cost effectiveness, but expediting consolidation which was expected to achieve faster response, better training, and newer equipment. Trading off benefits was frequently observed in the situation where instigators promised wage increases to insure employee support.

EVENTS AFFECTING THE CLIMATE FOR CHANGE

Individual events and circumstances affected the climate for change either positively or negatively. For example, a disastrous fire produces a time period where the question of

reform becomes topical in the community. But after a number of years, the memory of the fire wanes and the climate swings away from reform and complacency sets in.

One revealing fact was that unless sufficient precedent conditions existed, there was very little likelihood that the instigators had a chance of accomplishing their reform. The most important precedent condition was the power of the "chief opponent." He not only was fighting for his job but he was the figure around whom the opponents would rally, disclaiming any self-interest themselves. In an agency administration reorganization effort within a county, the chief opponent might be a powerful department head who would lose his direct access to the chief administrative officer if reorganization succeeded. In fire consolidation, it could be the fire chief of the smaller district who would be demoted to an assistant chief in the larger district. In city-county consolidation it might be an elected sheriff who could become appointive under the reformed system.

In over fifty percent of the successful reforms the chief opponent was retiring or about to leave office for some other reason at the time of the effort. In over half of the remaining cases, the chief opponent yielded to the reform campaign by means of compromise, political pressure and, in a few cases, logic. But almost no campaign for cost and efficiency succeeded when it was necessary to directly confront a chief opponent who had at least moderate community standing and the active backing of his employees..

LABOR UNIONS

As might be expected, employee labor unions are reluctant to support a reform program until they can be assured that their members' job situations will be the same, if not improved, in the new structure. Most successful reforms promoted the higher salary and benefit structure for the participating jurisdictions when there was a discrepancy between jurisdictions' structures. There were no examples of higher salaried employees taking a cut in pay. Sometimes union support was conditional on receiving a commitment from the reformers that the union would represent the employees of the new department. An observation made during one incremental reform was that union pressures for wage increases surfaced at times not expected by the instigators. The following hypothetical situation illustrates what can happen: Districts A and B consolidated and the higher salary level was selected. A/B wants to annex C. If C has a higher salary level than A/B, it can be expected that the award of the C wage scale to all will be the condition upon which the A/B union will support the annexation. But if C has a lower scale, the instigators are apt to recommend the C employees join at the A/B level. The A/B union may disagree and indicate that it will not support the merger unless A/B members also receive a raise. Their rationale is that C employees should not receive a raise unless A/B employees also get one. The escalation effect can be dramatic in the case of a series of mergers.

THE USEFULNESS OF REPORTS, CONSULTANT STUDIES AND TECHNICAL JUSTIFICATIONS

The usefulness of written reports is not clear. It may be necessary to compile data to justify the reform, employing, in some cases,

outside consultants to lend authenticity to conclusions already reached by the instigators and nucleus. But while data has informative and support value, it can also give opponents numerous opportunities to counterattack and nit-pick.

Technical reports without political sensitivity proved to have little value. It is sometimes found, however, that instigators are not unhappy with a report that recommends a consolidation greater than the one under consideration because this allows the instigator's proposal to be discussed as a compromise. But, even in this situation, it was universally agreed that a report would be much more effective if it reflected at least some understanding of the forces defending the status quo. For example, one technical report on the feasibility of fire district consolidation recommended the elimination of all stations from one of the proposed participant jurisdictions and the relocation of a newly built station less than three blocks from the original site. The instigators later concluded that extreme adherence to professional consultant's logic in the reform campaign was too high a price to pay to lose the support of even one significant jurisdiction.

It was also observed that as a reform nucleus matured, long detailed reports were often unnecessary. In one case study, the first report written by the instigator was over forty-five pages long. He wrote a similar report for a different area ten years later in eight pages. Three years thereafter he wrote yet another; this one was only three pages long. The instigator had learned that even the professional's attention span on the technical

aspects is very short, and that a brief summary of the benefits and a map of the "before-and-after" situation sufficiently accomplished his purpose.

The preceding observations are offered not because the researchers believe that they are comprehensive, but because it is hoped that they will be useful to those embarking on local government reform. Further analysis of the case studies which follows in the body of this report, as well as evaluation of other reform efforts that have occurred throughout California, will produce additional observations and conclusions about how change is accomplished on the local government level.

CHAPTER THREE

ADMINISTRATIVE REORGANIZATION OF THE SAN DIEGO COUNTY GOVERNMENT

The Setting

In a period of a little over three years, the county government of San Diego transformed a loosely knit group of over forty departments and one hundred commissions and committees reporting directly to the Board of Supervisors into a modern, efficient, accountable management structure. Although the Board of Supervisors had the power to accomplish most of the changes itself, it took a three year campaign to accomplish what has been called "one of the most significant major events in the state and county communities' profile in a decade." The change effort reformed a structure of county government that previously was not responding to the expanding responsibilities of an emerging urban county. (See Panel A). In 1969, when only a problem with a "high noise level" (one with high political impact) was able to receive more than cursory attention from the Board of Supervisors, these changes were initiated by a group of aggressive and careful public administrators and elected officials. There were several instigators who were identifiable and a nucleus of key actors. It was carried out at a time when there was a desire for more efficient management, greater demands for more services, a concern for the high cost of government, the retirement of a long-time chief administrator and a relatively successful precedent at the state level to use as a backdrop.

Climate for Change

As early as the first days of 1969, concern was developing that the scope of the county government responsibilities would be significantly broadened because of a new emphasis on human problems and physical development. The top policy staff had already recognized that they were too preoccupied with problem-solving on a daily basis to accommodate this growth. To meet the problem, coordinating councils covering the areas of human resources programs, economic opportunity issues, and treatment of alcoholics, as well as other areas of physical resources, general and community planned development, engineering, public works and special district services were suggested as a solution in an internal working document. The chief administrative officer recognized the problem and decided to treat it step-by-step, beginning with the physical resources area.

Instigator Begins

In April, 1968, a new chief administrative officer was appointed. By March, 1969, after considerable staff work and pre-sell to each of the members of the Board of Supervisors, the chief administrative officer submitted a memorandum calling for the creation of a public works administrator to coordinate the departments of county engineer, special district services and public works. It was no mere coincidence that personnel developments in the departments dealing with resource development made him decide to concentrate on this area. Several pending retirements and recent board criticism of many of the department heads made the selection easier.

It was proposed that the new public works administrator would act under the direct supervision of the chief administrative officer. The personalities were oriented toward change. It was agreed that any vacancies that "might" occur in the process would be filled only after careful review by the new public works administrator and the chief administrative officer to make sure that conflicts of direction and ambition were avoided. Within the year there were several early retirements. The handwriting was on the wall. There was no desire to create a single super-department and, to insure a flexible situation, the chief administrative officer recommended that the incumbent engineer who was a tough, no-nonsense administrator (former state president of the county engineers' association and active in the local comprehensive planning organization), fill the position of public works administrator.

This administrator had been responsible for much of the county's emergence prior to 1968 as a power to be reckoned with in county-wide transportation efforts and related planning activity. Without the growth of the planning effort attempted by the Comprehensive Planning Organization, in which the new administrator had a part, it is doubtful the county would have been challenged to get its house in order. At this time, the chief administrative officer was also aided by several concomitant events. Two new supervisors were elected who were former city councilmen. Familiar with the Council-Manager system, they were pledged to "turn the county around."

First Reform Implemented

The new public works administrator moved swiftly to establish his base. Utilizing borrowed personnel, he laid out a

step-by-step implementation program. Routine symbolic action was taken, including new letterhead and staff meetings under the new administrator's direction. Fiscal, personnel and accounting activities were designated to be consolidated under his direction. The task involved such a major reorganization that they were carefully monitored by the chief administrative officer and his staff. It was to become the model for future action.

It should also be noted that this individual was to concentrate on the new position and give up his leadership role with the Comprehensive Planning Organization, which opened the door for a more active role for the chief administrative officer and one of his principal assistants who wanted the job.

The new public works agency organization consisted of four departments and five agency divisions. The department divisions were the existing departments of county engineer, public works, (which later became general services and picked up numerous new functions) and special district services (later the department of sanitation and flood control) and the department of building inspection which was formed early in 1970. The agency divisions were fiscal and personnel, park development, airport operations, real property, and communications and electronics. Next began the inventory of all county government functions and the placement of all those involving physical resource activities in the appropriate department or division of the public works agency. It was believed at the time, and has since been proven, that the methods and techniques incorporated into the organizational framework of an agency

having all resources under an administrator would make those resources more readily available and enable accelerated assignment to solve problems of great urgency.

Building on the First Reform

In September, 1969, the Board of Supervisors called for help from a group of local businessmen, several of whom had served on Governor Reagan's Task Force on Efficiency and Economy. They created the San Diego County Efficiency Study, Inc., which was chaired by a leading business and civic leader. Members were drawn from high level, non-political community leadership.

The study set for its goal a five to ten percent reduction in county expenses and began its work. County departments cooperated with the study group once the administrators realized that they had a concurrent responsibility.

By December, 1969, a key group of county staff was working on its own plan. The document which was eventually prepared avoided recommending the elimination of the election of the recorder, sheriff, treasurer, county clerk, tax collector and assessor, and also avoided addressing the question of the elimination of approximately one hundred commissions and committees whose opposition to the reform would be deadly. But, in all other respects, the report was completely detailed in nature and sweeping in effect.

To avoid early critical opposition, the Board members were asked to review the county staff's plan privately. Upon agreement with its content, they were asked to resolve only to allow the chief administrative officer to proceed with planning, charging

him to bring back a recommendation to the Board later. Such a reorganization, as eventually evolved (see panel B), required, in initial outline, shifting of functions, establishment of appropriate civil service classifications and potential future ordinances.

The Board of Supervisors was particularly active. Several detailed memoranda from its members caused numerous changes in the first recommendation which was presented to the Board in December, 1969. Within a month, the San Diego County Efficiency Study Report was presented. In addition to a number of specific recommendations to improve the efficiency of county government was a recommendation for the integrated organization (see panel C). The basic tenets of the study report included the following:

1. the reorganization should free the Board and the chief administrative officer from many day-to-day administrative duties, so that their principal time could be spent on the more important questions of policy;
2. the reorganization must provide the chief administrative officer with an organization assistant and a span of control that would allow him to answer the demands of the Board of Supervisors;
3. any plan of reorganization must facilitate the provision of county government services to the citizens of this county.

Further, the report articulated benefits to be expected from the reorganization:

1. San Diego County would be able to more effectively participate and plan for future county programs;
2. the Board and chief administrative officer would be able to give major attention to significant policy questions and changing relations with other agencies;

3. reorganization would clearly establish the responsibility for operation of county programs;
4. reorganization would provide better coordination of services to the public;
5. reorganization would make better use of the existing county resources.

Board Approves Reform

In April, 1970, the Board of Supervisors approved the total concept of agency organization. Prior to the formation of any new agencies, it was necessary to make one minor change in the county charter. An Executive Service of the County was to be created to include all appointive county officials and their principal assistants. It was proposed that heads of agencies and departments could be removed by action of the Board of Supervisors. Thus, performance, not tenure, would be the basis for an employee to be continued as a head of one of these key activities. Obviously, this was backed unanimously by the Board because, at that time, even the key department heads were in civil service status, with its attendant difficulty in removal and recruitment. Editorial support by local newspapers, in addition to that of the key San Diego County Efficiency Study Committee, paved the way for public adoption in November, 1970. Following this ballot victory, reorganization implementation moved vigorously ahead in January, 1971.

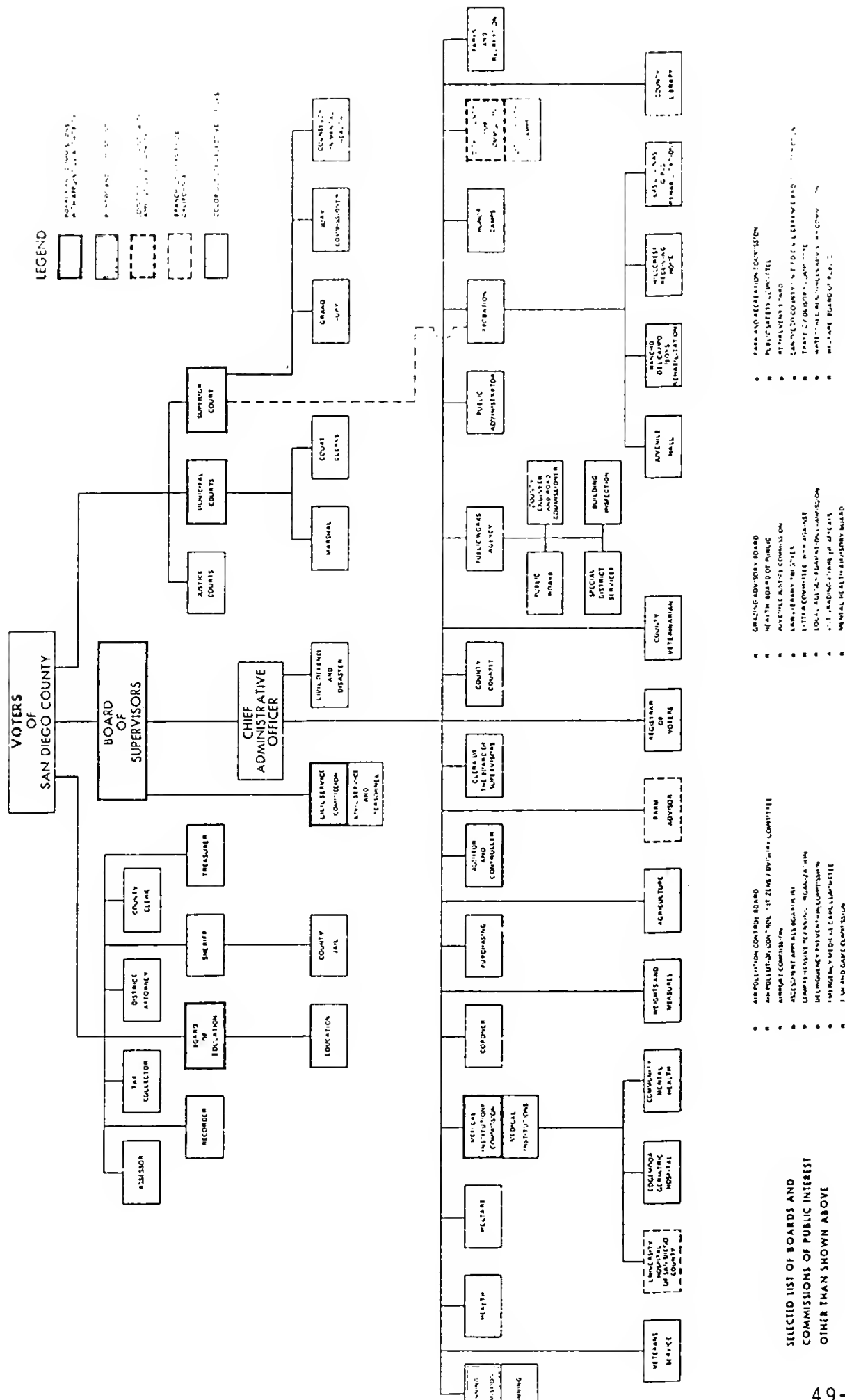
Continuing Reform

The change didn't stop; it proved to be the beginning of a continuing process. A look at panel D shows the difference in names, minor functional changes, and title changes, and graphically

tells the story of the magnitude of this administrative reorganization. Reorganization such as occurred in San Diego in the early 1970's is still alive in June 1973. There has yet to be an evaluation of the merits of this sweeping reorganization. Only the enthusiasm of those interviewed serves as an indicator that the reorganization is at least equal to what they had hoped. Several of the agencies have proven to be working well, with either significant cost savings or a better level of services extended to the taxpayers, or both. The County Counsel has observed that it is still not clear how the Board can legally control independently elected officials who are considered a part of the agency system; but it is now obvious that better communication and coordination has been established. Pragmatically, since the agency heads are responsible for budget coordination, they exert a definite constructive influence even on the independently elected officials.

One comment in all of the interviews was that organization and management of this county government is a constantly evolving phenomenon. Two and a half years later, there remains a real concern about revising the charter and locking the future San Diego County government into an inflexible eight agency system. This concern may be very futuristic or it may exist because some of the agencies are not yet functioning at peak efficiency. It does, however, reflect the wisdom of the need for gradual change in any reorganization. All persons involved also stressed the need for continuous evaluation and adjustment to meet new program demands and new crises.

COUNTY OF SAN DIEGO - ORGANIZATION CHART



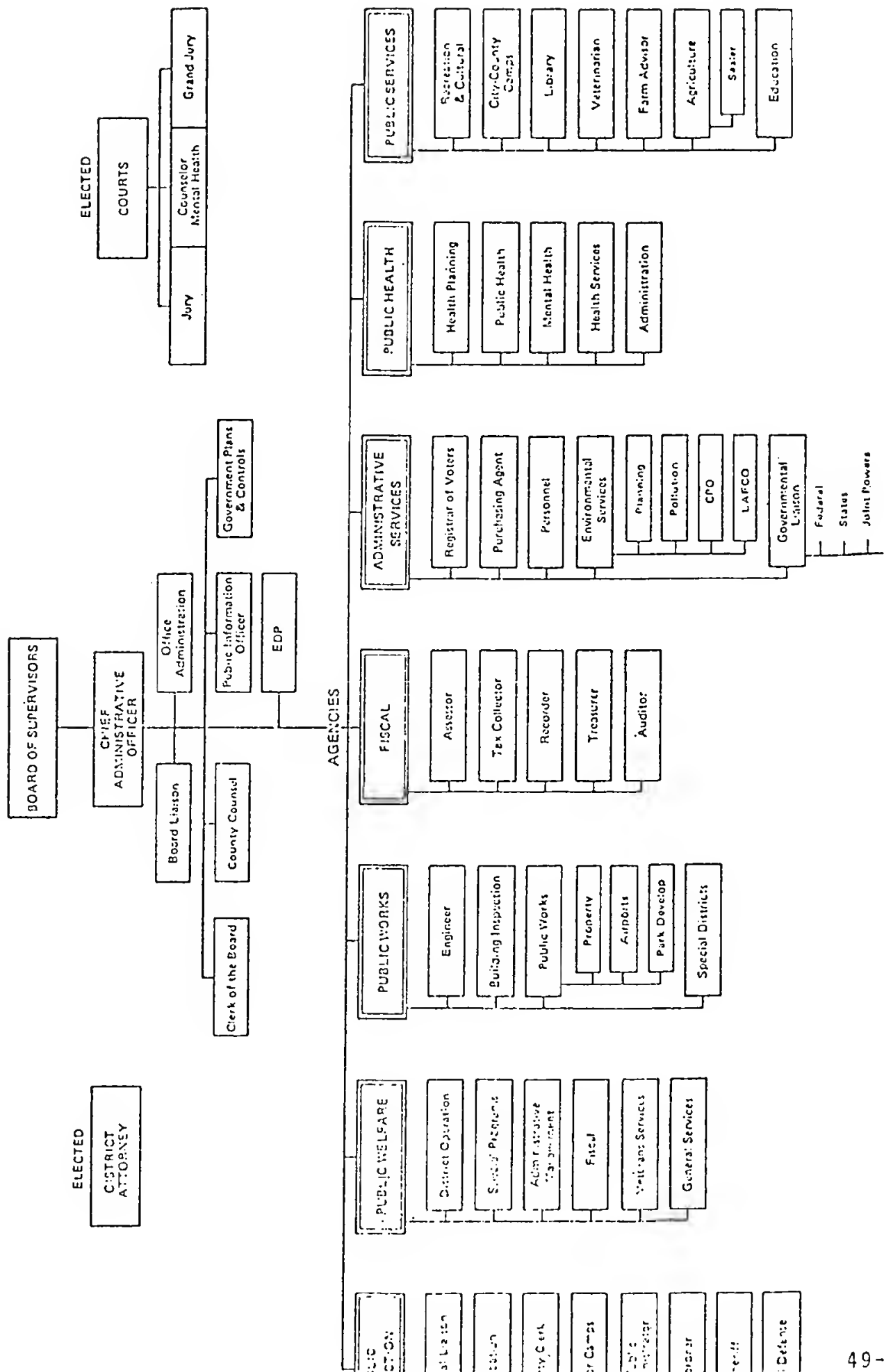
The organizational chart for the County of Santa Clara, California, is structured as follows:

- BOARD OF SUPERVISORS**
 - CHIEF ADMINISTRATIVE OFFICER**
 - Public Information Officer**
 - Personnel**
 - County Counsel**
 - AGENCIES**
 - LAW ENFORCEMENT COORDINATION**
 - Superior Courts
 - Municipal Courts
 - Justice Courts
 - County Clerk
 - District Attorney
 - Sheriff
 - Coroner
 - HUMAN RESOURCES**
 - EOC
 - Human Relations
 - Welfare
 - Precubation
 - Honor Camps
 - Veterans Service
 - PUBLIC WORKS**
 - Property Management
 - Airport Operations
 - Park Development
 - Electronic Communications
 - General Services
 - County Engineer
 - Sanitation & Flood Control
 - Building Inspection
 - PROGRAM DEVELOPMENT**
 - Organizational Planning
 - Program Plan Develop & Review
 - Special Projects
 - Electronic Data Processing
 - FISCAL COORDINATION**
 - Assessor
 - Tax Collector
 - Treasurer
 - Auditor
 - Purchasing Agent
 - Recorder
 - ENVIRONMENTAL DEVELOPMENT INTER-GOVERNMENTAL RELATIONS**
 - LAFCO
 - GPO
 - FOG
 - Legislation
 - Planning
 - HEALTH CARE SERVICES**
 - Medical Institutions
 - Public Health
 - GENERAL SERVICES COORDINATION**
 - Register of Voters
 - Form Agency
 - Seals
 - Veterans in
 - Cell Phone
 - Education
 - Open & Recreation
 - Library
 - City County Comm.
 - Public Admin. Officer
 - Agriculture

Legend:

- Empty box: Denotes Elective Office
- Box with horizontal lines: Denotes Assigned Department Head
- Box with vertical lines: Denotes Agency
- Box with diagonal lines: Branch - University of California

Efficiency Study Committee Organizational Proposal



Was This A Campaign?

On the surface, it would seem that the reorganization was really only the result of the work of a few hard driving administrators with a little luck. In the early phases of the talk that surrounded this reorganization, there were several identifiable instigators. The Chief Administrative Officer who recognized the need to get out of the every day crisis world that beset his predecessor was, surely, the main instigator. He was willing to think through the problem and stick with a goal of reorganization. He gathered about him a half dozen close staff in whom he could place confidence, and he kept control. This is not to downgrade the role of the Public Works Administrator and several of the more vocal Supervisors.

A Climate for Change

The particulars have here been discussed, and while it cannot be said that county services were about to collapse, these services needed revamping. There was a strong desire to act, prompted by the apparent success of Governor Reagan's state reorganization. This had to be a major force convincing the more conservative members of the Board that change was something they should consider. Into this climate stepped the successful instigator and his nucleus.

There was considerable contemplation, which study of the numerous documents indicated, and there was a substantial give-and-take and staff evaluation before any of the ideas became public. The Public Works Agency Administrator and others were constantly

involved in "brain-storming" sessions with the Chief Administrative Officer and his staff, working out as many difficulties as possible before even the easiest decisions were requested.

Comprehension

The issue of selling the need for change and modernization ran throughout this restructuring process. The Chief Administrative Officer realized the issues were as complex as tackling a consolidation effort with another county, but he concentrated on the issue and let the opinions and much of the actual organization form by themselves. With the Public Works organization as his successful precedent, along with a successful state example, momentum was established and maintained.

Communication

While the project was somewhat less newsworthy than a major multi-jurisdictional reorganization, yet, by the time there was a need for support on the minor charter revision, the newspapers and local media fully supported the amendment. The very fact that so many different and key local officials of public importance were supportive made this easy.

Concern

The part played by San Diego Study, Inc. should be emphasized. On that committee were the first echelon key community leaders. Without their help, restructuring might have been thwarted by those with self-protection and job security as their only and principal concern. This group was non-political and, as such, extremely effective.

Cadence

The instigator and his nucleus remained conscious of need to proceed cautiously and to time the political decisions so as to encounter only brief political opposition centered around the facts.

Compromise

This was most evident throughout this model exercise in restructuring. A look at some of the early documents, and then at the final proposal, proves that compromise and constructive alternatives made the proposal far more attractive.

Cooperation

This was not a significant problem. There was a close working relationship with the Sacramento legislative leadership. Especially, the County legislative advocate in Sacramento was careful to keep all the legislative delegation informed and current on progress. Most importantly, they did not interfere with nor oppose the project.

In summary, the campaign produced sweeping county reorganization, embodying all of the principles which the investigators found common and essential to success.

CHAPTER FOUR

CONTRA COSTA COUNTY FIRE DISTRICT CONSOLIDATIONS

This detailed chronology of ten years of effort in Contra Costa County addresses many of the complex problems in efforts at intracounty consolidation of local government jurisdictions. The Contra Costa instigators, however, had no precedent to follow when they started, thus making acceptance of consolidation extremely difficult.

The Setting

The contemporary effort to consolidate fire protection jurisdictions in Contra Costa began in 1955. To date, eight jurisdictions have been eliminated, each through a separate campaign. Ten additional efforts, some county-wide and some single district proposals, have failed. Three campaigns to eliminate seven jurisdictions are presently pending.

The successful reallocation efforts were instigated by a capable and highly tenacious member of the county administrative staff who, since 1966, has also been the LAFCO executive secretary. Assisted by a small number of progressive and politically sensitive reformers, including an ambitious, professional young fire chief, a few "enlightened" commissioners, and two supervisors, this nucleus in some campaigns also included the fire fighters union, other city and county government officials and citizen groups. The reformers brought off an impressive series of consolidations in the central region of the county. In the western region and the urban portion of the eastern region, similar

efforts are currently pending following initial failures when the reformers were unable to overcome strong opposition.¹

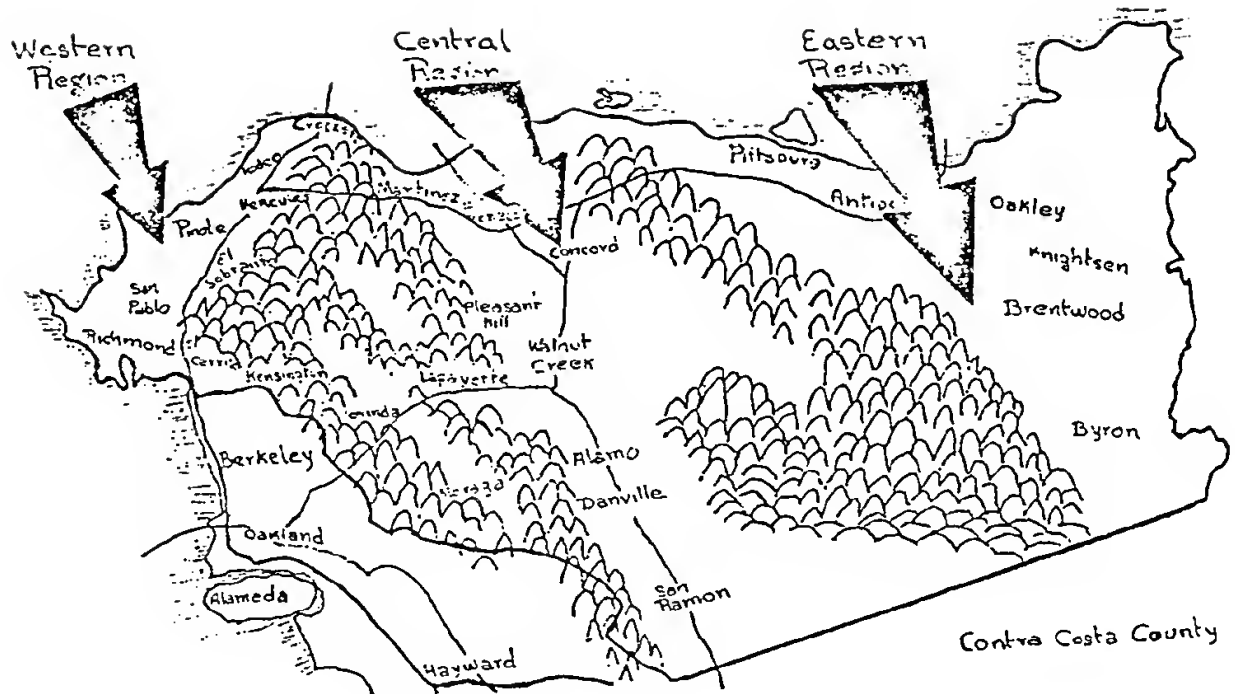
Early Efforts

In 1955, the Board of Supervisors asked the County Taxpayers Association to appoint a committee to study the possibility of consolidation. They recommended a county-wide fire protection jurisdiction. The committee's recommendation was not acted upon when such vested interests as fire chiefs and commissioners labeled it "unprecedented and much too radical." (See Map 1)

A 1959 county administration study, written by the instigator, who had concluded that comprehensive consolidation was politically infeasible, recommended a merger of ten central region fire districts and a separate merger of two rural eastern region fire districts. This report reflected the instigator's new strategy to reach ultimate county-wide consolidation through smaller mergers and subsequent annexations. As in 1956, the 1959 report died at the hands of vested interests, especially after considerable press coverage stressed the large size of the proposed district. Because the instigator had hoped that consolidation would result solely from a clear presentation of the facts, he had failed to provide for a politically adroit team of reformers to sell and implement the report. Its recommendations fell on deaf ears among local governing officials and the interest and the public support of the County Administrative Officer was lost once he realized that there could not be an acceptance of rapid reallocation.

¹ See Table 4 for Demographic Descriptions

MAP 1



A flurry of activity surrounded the call of the Board of Supervisors in 1961 for a consolidation study. In the absence of a climate for change and a nucleus of already educated reformers, this initiative by one of the freshmen members of the board was killed. The appointed advisory committee, already stacked by opponents of change, quickly and unanimously recommended against any consolidation.

Did They Learn From Their Mistakes?

The 1959 report, nonetheless, had gained a measure of respectability and it became the basis of discussion in Contra Costa for the next five years. It also put local government officials on notice that the county was considering consolidation as a means of reallocating services. Meanwhile, the instigator and the change nucleus arrived at the following conclusions from the defeat:

1. county-wide consolidation was impossible because of the lack of precedent and the large number of potentially opposed public officials
2. a study report, regardless of its objectivity and lucidity, could only facilitate consolidation; it could not unilaterally achieve it
3. future reallocation efforts would have to proceed incrementally at times marked by an appropriate climate for change.
4. each incremental effort in the reform process would require an extensive campaign to support.

The First Success

A successful consolidation effort began in late 1963 when the instigator identified two districts as "ripe" for consoli-

dation. Both districts were county fire service districts and therefore could be consolidated by simple supervisorial resolution. They were located in the fast-growing suburban area of the central region where city boundaries had become entwined. There were obvious and numerous cost and efficiency benefits to be realized by consolidation. Over several months the instigator fashioned a nucleus of reformers which now included two supervisors, the acting fire chief and two commissioners from one of the districts to be consolidated, the executive secretary of the County Taxpayers Association and the officers of the fire fighters union.

Original Strategy

The instigator's strategy was to consolidate the two natural districts into one and then expand it through incremental annexations whenever the right climate for change occurred. Although the first attempted annexation was rejected by the "fire establishment" of a large rural, all-volunteer district, six neighboring districts were annexed over an eight year period. The new Contra Costa Consolidated Fire District, however, lost its preoccupation with annexation by the late 1960's and the district itself rejected three annexation requests from neighboring districts as financially undesirable.

Modified Strategy

In 1956, the reformers had called for one county-wide district, or at least no more than three districts. By 1973, the reform strategy called for nine districts, a number that reflected the growing awareness of differences between urban-suburban

and rural districts and between salaried and volunteer fire departments. The strategy, now, was to merge jurisdictions only on the basis of their structural and functional similarities, with due allowance for geographical barriers. The original goal of creating a county-wide fire district had been abandoned.² (See Maps 2, 3, 4)

First Campaign

The first consolidation occurred between the Central Fire District and the Mt. Diablo Fire District in December, 1964, after an intensive thirteen-month effort during which the reformers had either neutralized some of the potentially most powerful opponents or gained the support of others. (See Map 5)

The campaign was divided into two phases:

1. an informal pre-public phase during which awareness of the campaign extended to no more than fifteen people. This lasted from November 1963 to September 1964.
2. a public phase timed to occur only after the reform leaders had identified the barriers and formulated solutions. This phase lasted from September to December, 1964, and included meetings with the two fire commissioners, hearings before the Board of Supervisors, presentations by the reform nucleus to each City Council and considerable attention in the media.

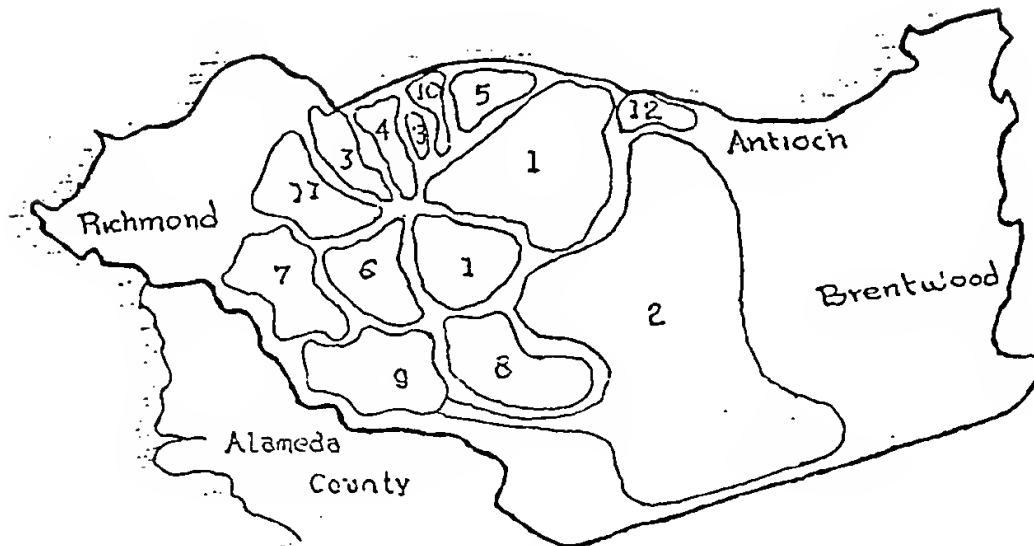
Climate for Change

The instigator, in early 1963, approached the Supervisor whose district included the Central and Mt. Diablo Fire Districts,

² See Table 5 for Chronology

MAP 2

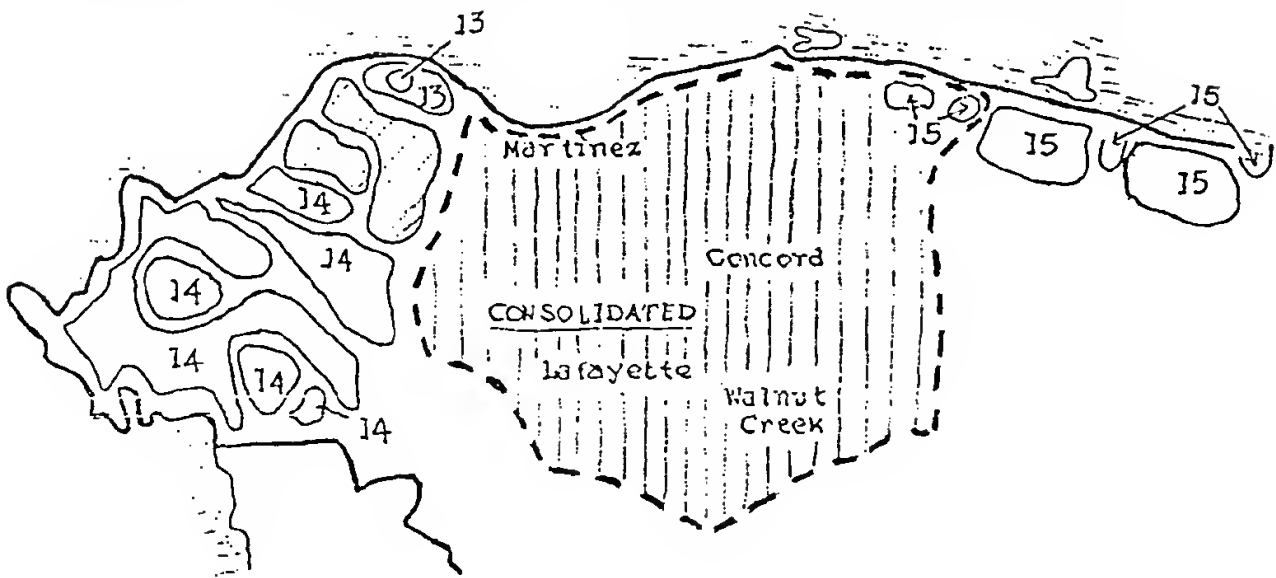
Consolidation Efforts in Central Contra Costa.



- | | |
|-------------------|--------------------|
| 1 - 1964: success | 7 - 1969: failure |
| 2 - 1966: failure | 8 - 1969: failure |
| 3 - 1966: success | 9 - 1970: failure |
| 4 - 1968: success | 10 - 1970: success |
| 5 - 1968: success | 11 - 1971: success |
| 6 - 1968: success | 12 - 1972: failure |

MAP 3

Consolidation Efforts in Western and Eastern Contra Costa.



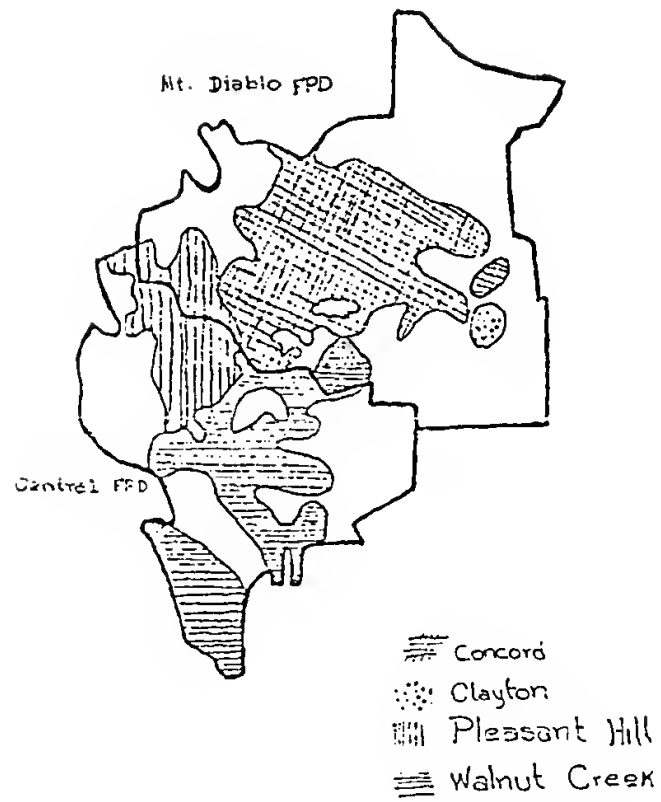
- 13 - 1965: success
- 14 - 1970: failure
- 15 - 1973: pending

MAP 4



16 - 1973 : Pending
17 - 1973 : Pending

MAP 5



suggesting that his active, if indirect, support of consolidation would be a smart political move. If he participated, the Supervisor would receive credit as the first local government reformer in the county who had lowered taxes and increased performance. The Supervisor was initially fearful of a public backlash. Because he was already identified as a member of the "new politics" group that had only recently ousted the local political machine, he was not close to the fire establishment nor the "old guard" fire commissioners, some of whom had retained their appointments for forty years and were adamantly adverse to change.

This Supervisor launched a "trial balloon" announcement of his support for consolidation and found no public opposition. About this same time, the District Attorney initiated an investigation of two long-time Mt. Diablo Fire District commissioners over possible conflict of interest. The Supervisor, who was seemingly unrelated to any reallocation plan, appointed three new members to the commission.³

Also, in 1963, the aging Central fire chief was hospitalized and his young, professional and ambitious assistant was promoted to acting chief. The acting chief quickly joined the instigator and the reform Supervisor to spearhead the consolidation campaign.

Pre-Sell Activities Are Launched

The reform leaders immediately sought to strengthen the hand of the acting chief and broaden the base of the reform

³ He could have appointed pro-consolidation members but instead he appointed unknowns, but individuals who, at least, were not anti-consolidation at the outset.

nucleus by winning over his fire commission. Giving the Central Fire District commissioners a leadership role would add legitimacy but, more significantly, it would preclude the possibility of the commissioners undermining the acting chief (who was later appointed chief). In a number of individual meetings the reformers succeeded in convincing each commissioner to perceive himself as the creator of a new jurisdiction that was clearly in the public's interest. This work was so successful that the Central commissioners, during the public phase, announced their willingness to retire in order to facilitate consolidation! This appeared to remove the stigma of self-interest but, in truth, the commissioners believed that two, perhaps three, of them would be selected for the new commission.⁴

The First Stumbling Block Occurs

During the Spring of 1964, the Walnut Creek City Council became concerned that the city was not a "full service" city. Vaguely aware that a reform effort was building in the county, it decided to remove its fire service from the Central Fire District. Some Councilmen tentatively offered the position of chief to the acting chief who became more determined to assist in the formation of a consolidated district. Needless to say, he turned this position down as it would clearly alienate him from consolidation support.

The Walnut Creek proposal was set for a hearing before the Board of Supervisors during the summer (in time, this was prior

⁴ Only two Central fire commissioners were appointed. Two subsequently moved within the county and became fire commissioners in that fire commission. One, a close friend of the fire chief, retired.

to LAFCO). The executive secretary of the County Taxpayers Association, who had advocated consolidation for many years, blasted the proposal as inefficient and uneconomical. With three pro-consolidation Supervisors on the Board, the Board rejected the request.

The Stage Is Set

A little later, in the summer of 1963, the reformers held a meeting of the Central and Mt. Diablo district commissioners. This meeting was called ostensibly to discuss mutual fire protection problems. The meeting, held in semi-secrecy, was actually scheduled to propose the idea of consolidation to the Mt. Diablo commission. With three new members recently appointed by the reform Supervisors, the Mt. Diablo commission proceeded cautiously. It acknowledged in private the validity of the arguments in favor of consolidation, but declared the necessity to protect its chief and fire fighters who opposed merger. At the suggestion of the reformers that "something could be worked out," the Mt. Diablo commission offered to accept the idea of conducting a feasibility study. This study was then announced by the chairmen of the two commissions at a September press conference.

The Campaign Begins

The need for a study was dictated largely by the Supervisors' unwillingness to order this unprecedented consolidation without indication of public support. The instigators wanted to avoid an election and believed that the Supervisors would approve consolidation once the study, to be written by the instigator,

recommended it. Consequently, the reformers did not pressure the Board and, instead, educated the working press so it would not inadvertently give the appearance of public opposition. The major Central county region daily newspaper shortly thereafter headlined that "consolidation is getting a warm reception from the two commissioners."

The Central fire commissioners quickly endorsed consolidation, but the Mt. Diablo commissioners only endorsed the need for study and hearings. They also requested that the Board of Supervisors delay any action until December. Again the reformers decided against a confrontation and acceded.

During October, the reform leaders met informally several times with the commissioners, chief and fire fighters' union officials in the Mt. Diablo District to discuss the future of the chief, other personnel, salaries, equipment and fire station location. Because of the unexpected opposition from a former commissioner, who had helped to found the district in 1928, and because the reformers were very anxious not to lose their first real campaign, they agreed that the proposed consolidated district would be commanded by two equal co-chiefs, one in charge of operations and the other of administration, until the former Mt. Diablo chief retired.⁵ The reformers also promised the union representing the Mt. Diablo Fire District that they would represent the consolidated district and that improved salaries could be expected in the new department. With this, the union publicly endorsed consolidation.

⁵ The chief retired in two years, whereupon his son became an officer in the consolidated district.

A Setback Is Overcome

By early November almost no effective public opposition emerged. The reformers were surprised and frustrated when the Supervisors suddenly ordered the proponents of consolidation and the commissioners of both districts to meet with the city councils of Concord, Clayton, Pleasant Hill and Walnut Creek to obtain their opinions on the proposed merger. But the Board also passed a motion by the reform Supervisor to set the question of consolidation for the December meeting. The reformers were relieved because they knew that without a fixed date essential momentum would be lost.

In the intervening three weeks the reformers held numerous private meetings with most of the city councilmen and city managers to gauge their attitudes and to sell them on consolidation. The formal presentations were then made before the cities: Pleasant Hill (November 16), Clayton (November 19), Walnut Creek (November 20), and Concord (November 24). It is significant that only two former Mt. Diablo fire commissioners appeared to oppose the reformers. None of the Mt. Diablo fire commissioners and Mt. Diablo personnel at that time were present. Consolidation was endorsed by three of the four councils present.

The reformers also obtained a pro-consolidation editorial in the major Central region newspaper in mid-November and a public letter to the Supervisors from the Pacific Fire Rating Bureau verifying that the claims made in support of consolidation were "factual and had considerable merit."

One seemingly unrelated event occurred during this month when three rural eastern fire districts asked the Board of

Supervisors for permission to reorganize as autonomous districts. Such reorganizations, if permitted, might have defeated consolidation by being interpreted as a precedent that all consolidations require elections. (See the appendix on the District Reorganization Act concerning reorganizations of autonomous districts). The reform supervisor, alert to this implication, asked his colleagues to postpone that issue until the on-going effort, which was close to decision, could be concluded. The Board agreed.

The City Council Votes

The Pleasant Hill City Council, whose members and city manager identified themselves as reformers in county-wide politics and who believed that their constituency would be satisfied with the fire protection services offered by the new district, voted unanimously to support consolidation. The Walnut Creek City Council, still smarting from the Board's refusal to grant its request to form a city fire department, voted not to take a stand. Later, in a symbolic gesture, they endorsed consolidation after it had been approved and after they had appointed one of their city councilmen to the new commission. The Concord City Council, on the recommendation of its city manager, who thought a consolidated district was the best alternative to creating a city fire department, voted 3-2 to endorse the merger. The swing vote was cast by a close personal friend of the reform Supervisor. The Clayton City Council, aware that the vote of its large neighbor, Concord, would be close, postponed its decision until after the Concord vote. Thereafter, they supported consolidation unanimously.

Supervisors Approve Consolidation

The Supervisors met on December 1, but because the Mt. Diablo Fire District commission had not yet taken a stand and no one from the opposition, except two former Mt. Diablo commissioners, were present in the audience, they rescheduled the hearing for December 29.

Considerable controversy raged within the Mt. Diablo commission. On December 8, it voted 4-1 to oppose consolidation. The one proponent of consolidation worked hard to persuade his two recently appointed colleagues to vote with him, but they felt that they had to be loyal to the old-timers even though they themselves had been appointed by the reform Supervisor.⁶

Anticipating this opposition, the reform Supervisor had, of course, discussed extensively the pending consolidation with each Board member and had convinced all that the endorsement from three cities and the absence of notable public opposition should be sufficient justification for consolidation. After a pro forma presentation by both proponents and opponents, the consolidation of Central and Mt. Diablo Fire Districts was ordered by the Board on December 29, 1964, by unanimous vote. The implementation turned out to be relatively smooth under the leadership of the Central fire chief who became the first among equal co-chiefs. (See Table 2 for summary of opposition).

⁶ The one proponent and one opponent were appointed to the new commission.

The First Annexation Attempt Fails

Between 1965 and 1970 there were three attempts to annex all or part of the large and geographically incongruous Eastern Fire District to the new consolidated district. Through a combination of misperceptions on the part of the reformers, and stubborn resistance of vested interests and citizen opposition mobilized by the fire establishment, all three efforts have been defeated. (See Map 6).

In 1965, a meager tax base and a rapidly rising tax rate, due to increased fire service demands in the urbanized Western area (Zone 1 - Moraga), made Eastern a likely candidate for annexation to the consolidated district. The annexation proposal promised stabilization of the fire tax rate for the rural Eastern District, as well as better service, improved training, immediate backup on alarms, and a fire prevention staff. Annexation would also double the consolidated district, while creating only a small burden on its manpower and equipment, since a volunteer program by the State Department of Corrections would be continued in the rural portion.⁷

The instigator and the Consolidated fire chief, assisted by one Eastern District fire commissioner, worked for five months to establish an informal channel of discussion with the remaining commissioners and to sell the reform campaign, setting the stage

⁷ It was expected that the Western portion of the Eastern District, the Moraga area, would annex to the Orinda Fire District, which itself could be expected to be reorganized and conceivably annexed if the proposed Orinda incorporation was approved by the local electorate.

MAP 6



for a reallocation. They were totally unsuccessful and, in frustration, they persuaded the county's Chief Administrative Officer to initiate consolidation proceedings.

No Climate for Change

From the beginning, the reform leaders were beset by a basic inability to make progress in the environment in which they had to act. On one hand, they were pressured by the desire to enlarge the new district commensurate with its potential, a desire reinforced by a self-assured and expansionist Consolidated commission. On the other hand, they were confronted by an inability to recruit a politically adroit nucleus in the new territory with which to win over or neutralize the opponents.

The Supervisor whose district contained the rural portion of the Eastern District was unable or unwilling to offer much help. Unincorporated, the area offered no city councils through which the fire commission might be circumvented. The idea of calling for an enabling election was quickly discarded when the reformers learned of the parochial, anti-city philosophy held by many Eastern residents. Further, on March 1, the Supervisor, whose district contained Zone 1 (Moraga) and who had been persuaded to support special district reform by the original reform supervisor from Concord, asked the Board of Supervisors to create a special tax district for Moraga. Inadvertently, he undermined the reformers' argument for the annexation of the rural portion because, when the tax district was formed, the tax rate for the rural portion of Eastern District dropped significantly below the Consolidated district's rate.

The Campaign Begins

Even without a conducive climate for change, the instigator and the Consolidated fire chief invited themselves to the community which was the center of the Eastern District to speak on the advantages of annexation on two consecutive evenings in March. The meeting was attended by the commissioners, fire officials and volunteer firemen. The listeners interpreted the annexation proposal as another city-dominated county government attempt to take over areas of the county that only wanted to be left alone. Because of early public disclosure of the reform effort, local fire officials, who were strongly aware of their shortcomings when compared to the sophisticated Consolidated district, had spent considerable time educating their commission and local citizens on disadvantages of annexation. Loss of local control, bureaucracy and higher costs were "fighting words" for the resident farmers. When the Eastern District commission successfully petitioned the Supervisors in late March for additional time to study the merger proposal, annexation was stalemated for a year.

The Consolidated chief was still so sufficiently impressed by the Eastern District opposition in late 1966 as to be unwilling to reactivate the proposal. However, the instigator found the Eastern District presenting a petition to LAFCO to approve the detachment of a major mountainous area and, in his capacity as the LAFCO executive officer, he recommended the annexation of the entire Eastern District to Consolidated. Although, by then, Eastern's tax rate had again risen to 86¢/\$100 AV on a budget of

only \$25,000.00 (Consolidated's was 80¢/\$100 AV), this latest annexation proposal was again tabled when both the Supervisors and LAFCO approved the recommendation to create the Tassajara fire district out of Eastern, rejected a recommendation to annex the Moraga Fire District to the Orinda Fire District, and failed to annex the now smaller Eastern Fire District to Consolidated. The instigator had still not convinced the Supervisor representing the rural part of the Eastern Fire District that the time was right for annexation.

The First Successful Annexation

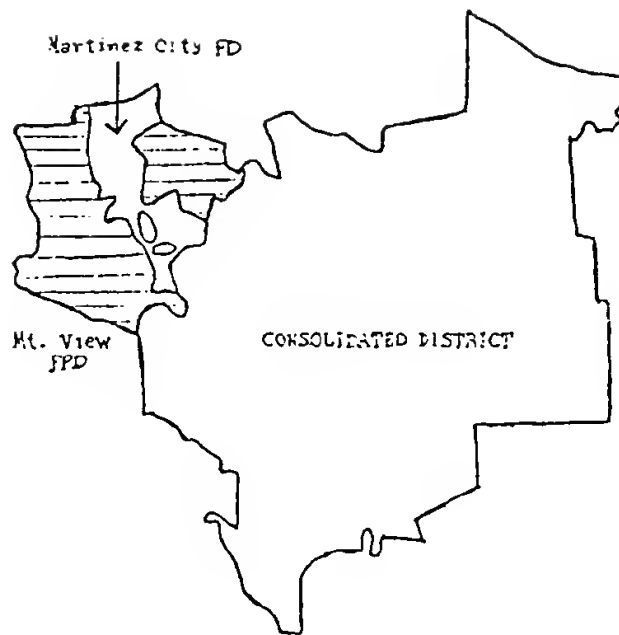
Six months after the initial Eastern annexation attempt had failed, a determined Board of Supervisors expressed its belief in the "wisdom of selected mergers" by unanimously voting the annexation of the Mountain View Fire District to Consolidated. (See Map 7).

The 1964 reformers instigated this annexation with the assistance of the local Supervisor because recent expansion by the City of Martinez into Mountain View territory had destroyed the original logic of fire station locations and had reduced the Mountain View tax base as well. The reform effort was begun in anticipation of the retirement of the Mountain View chief.

The Campaign Begins

The pre-public phase of the reform began when the reform leaders decided that they could possibly avoid time-and-energy-consuming enabling elections in subsequent non-county fire districts annexations, (i.e., city fire departments or autonomous

MAP 7



districts) by petitioning the Board of Supervisors to annex only the functions, assets and liabilities of the district in question to Consolidated, thus leaving a "paper" district. Sometime in the future the "paper" district would be dissolved for lack of purpose. This "functional annexation" procedure was approved by County Counsel and the State Attorney General's office.

The reformers, with the experience of the Eastern District failure, had also gained the active support of the local Supervisor who had already unilaterally caused the merger of the Crockett and Carquinez Fire Districts.⁸

The local Supervisor met individually with the Mountain View commissioners. He reminded them that they served at the pleasure of the Board of Supervisors, that the Board was impressed by the performance of the newly formed Consolidated district, and that although the commission had done an outstanding job in providing fire protection service to the unincorporated areas around Martinez in the past, it was now time for a change. The arguments were not sufficient, but the opposition from the Mountain View commission was quelled when their fire fighters supported consolidation. The fire fighters had learned they would receive better salaries and training and that the assistant chief would be transferred to Consolidated as a fire captain, but at his assistant chief's rate of pay. The instigators knew that firemen, who have time at their disposal to inform the public of arguments against consolidation, were crucial allies.

⁸ Some Supervisors thought that special districts in their supervisorial district were an administrative headache and were happy to assist in their elimination.

The fire commissioners, on the other hand, were remote from the citizens of the unincorporated areas and, without the support of their personnel, were incapable of generating an opposition campaign. They bowed to the Supervisor's request for neutrality and continued to remain invisible until the Mountain View District was annexed to Consolidated in December, 1966, and formally abolished in October, 1967. They did not appear at the LAFCO hearings in September, 1966, nor at the Board of Supervisors hearing in December. With no opposition, both Boards approved consolidation unanimously. With the precedent for fire district reform already established and sufficient reformers available to capitalize on the climate for change, an additional reallocation was achieved.

First City Fire Department Annexed

The next successful annexation occurred after an eleven-month campaign in 1967-68 when the citizens of Martinez (1968 population 14,700) voted to abolish the city's costly fire department in order to arrest a deteriorating fiscal condition. (See Map 8).

Climate for Change

The financial situation in the City of Martinez was worsening in 1967 at the time when a central region fire station master plan study conducted jointly by the instigator, in his capacity as LAFCO executive secretary, and the Pacific Fire Rating Bureau report was being circulated. This report stressed the poor location of fire stations in the Martinez area. It was seized upon by the Martinez city administration, a member of which was a former assistant to the instigator, as a way to improve

MAP 8



local fire protection service, strengthen the city's deteriorating fiscal condition and grant the local citizens a 40¢/\$100 AV "tax reduction."⁹

The Consolidated district with its one hundred and seventy men, twelve stations and fifty-four pieces of major equipment could offer increased first response capacity (three engines, instead of one, would roll on the first response to structural fires), automatic backup, a multi-million dollar training college and, most significantly, a record of fire tax rate decreases which had distinguished the district since its creation in 1964.

The Campaign Begins

These benefits convinced the Martinez city manager and two city councilmen, and they became Martinez-instigators. They held informal exploratory talks with their fire chief who was opposed to any reallocation, as well as with the fire fighters who soon were persuaded, over a period of months, to support the merger on the grounds that their salaries and benefits would improve in Consolidated. The instigators were unable to win over the chief, but he was suddenly stricken by a disabling illness which prevented active campaigning against the reform effort. The City Council then privately assured him that he would receive a full pension, even if he retired early, provided that he remain publicly neutral, which he did. (See Table 3).

⁹ The opposition strongly criticized calling this tax shift a tax reduction. The city rate went down but the citizens' taxes went up because Martinez did not reduce its rate by the amount of Consolidated's rate.

Because an earlier attempt to divest the city of its sewage treatment function had been defeated at the polls, the Martinez-instigators simultaneously sought to legitimize their efforts by recruiting a carefully selected seven-member advisory committee. In short order the majority of the committee issued a report (an employee of one of the major local industries dissented) recommending the termination of the city fire service and its annexation to Consolidated. At this same time the Consolidated chief was persuading his commission that Martinez was not a "poor" annexation.¹⁰

First Setback

Using the Mountain View precedent, it was hoped to accomplish this annexation by the functional annexation procedure which could be effected by a vote of the Council, LAFCO, Consolidated and the Board of Supervisors. LAFCO approved the annexation requests by a vote of 3-1-1 in mid-November, at the urging of its executive officer who argued that time was short if Martinez's fire service was to be annexed in time to be on the appropriate fiscal 1969 tax rolls.¹¹

¹⁰ He stressed that Martinez, with an assessed valuation of 36 million dollars, was growing at a rate of 15% annually and there was some chance of breaking the precedent that excluded the high assessed industry areas in the region from all fire jurisdiction. If this happened it would produce considerable revenue for Consolidated.

¹¹ The Walnut Creek city councilman on LAFCO opposed the annexation, one Supervisor abstained, two city representatives from Pleasant Hill and Richmond and the public representative supported, and the Supervisor representing Walnut Creek area who had been lobbied for his vote in mid-October, voted for the annexation.

LAFCO approval came over the opposition of the City of Walnut Creek, which asked for a delay to study the cost of annexation to the citizens already in Consolidated and over the opposition of the Consolidated fire fighters union who asked for an election in view of the fact that they would not receive a salary raise since Martinez had a lower schedule. Additional opposition came from a former Martinez city councilman who claimed he could obtain signatures of more than twenty-five percent of the Martinez electorate to force an election.¹² Among the supporters was a Martinez homeowners group which expressed strong support for the annexation. LAFCO also considered the question of an election, if called. On the recommendation of its executive secretary they voted that the election needed only to be held in the City of Martinez.

The Board of Supervisors held its meeting on December 19 to consider the annexation proposal. Originally, the instigators had hoped that the Supervisors would order the annexation at this meeting, but instead they found themselves confronted with two requests to hold elections. The County Clerk verified that twenty-five percent of the Martinez electorate had signed the petition calling for an election, and the Board of Supervisors set it for June, 1968.¹³

¹² An additional question, with the intent of delaying a vote on the proposal, was asked concerning the exclusion of industries in the Martinez area from fire jurisdiction. But after some discussion, which would be repeated numerous times in 1971-72, this volatile item was passed over.

¹³ It is very possible that the opponent's request for an election inadvertently saved the annexation proposal from defeat by the Supervisors who might have listened to the opposition of the City of Walnut Creek.

The Campaign Begins

The fire fighters of Consolidated persisted in their public opposition to the Martinez annexation but remained inactive during the full-fledged local political campaign that took place in Martinez. This may have been because it was understood that Consolidated employees would also get a salary increase if the lower paid Martinez employees were annexed. The Martinez fire fighters took an active part in supporting the annexation.

The Martinez opposition was unable to mobilize strong citizen feeling against the proposed annexation, largely because its leaders were members of the fringe of the Martinez citizenry and the instigators had won over potential opposition. On June 4 they voted by a margin of 3-2, to disestablish the city fire department and join Consolidated.

The following week the Board of Supervisors finally ordered annexation. Walnut Creek had attempted to obtain support from the other cities in opposing consolidation but failed to mobilize it.

Midnight Pay Raise Issue

Martinez and Consolidated then signed an agreement effectuating the transfer of employees into classifications based on their salary before transfer. The Martinez City Council granted its officers a salary raise commensurate with what they would earn if they retained their rank in Consolidated. Consolidated tried

to rescind the contract with Martinez or back out of the annexation but found that it was contractually bound to honor the pay raises.¹⁴

A Mini Annexation: The First Autonomous District

When the U. S. Navy acquired and razed the single major community, Port Chicago, in the Bay Point Autonomous Fire District in 1968, it eliminated the fiscal basis and major reason for the existence of the all-volunteer fire department. Consolidated was persuaded to annex this nearly defunct jurisdiction so that no territory in the county would be without fire protection, and because of the possibility that the industry located in Bay Point might eventually provide revenue to Consolidated. (See Map 9).

The Campaign Begins

The stage was set when the Navy established a buffer zone around its ammunition base on the Sacramento River and razed the unincorporated town of Port Chicago, thereby dramatically reducing the need and ability of Bay Point to provide adequate fire protection service for the remaining territory. Then, in April, 1966, a local developer who expected to build four hundred residential units in the Bay Point area requested that his land be

¹⁴ In all future reallocations LAFCO included a condition preventing "midnight pay raises." Consolidated protected its own interest, however, when it froze the grade and pay of the former Martinez employees until its own men caught up to the originally agreed pay differential.

MAP 9



annexed to Consolidated to improve his fire insurance rating.¹⁵ Shortly thereafter the local Supervisor indicated to the locally elected Bay Point directors that they were fighting a losing battle because "the whole area eventually should be one district."

The instigator, knowing this district was obviously a loser as far as Consolidated was concerned, sold the Consolidated chief on the premise that it would strengthen his position with the Board of Supervisors and his image with the public to agree to annex an area for the good of the total county fire protection service. An unspoken consideration was that the Supervisors might be persuaded to include the General Chemical Plant (one of twelve industrial plants in the county exempt from any fire protection district assessment in the annexation).¹⁶ He succeeded and obtained the reluctant support of the chief who spoke before LAFCO and the Board of Supervisors acknowledging that annexation of the Bay Point district would not place any additional requirement on his force.

Then the instigator informally approached the locally elected Bay Point directors to suggest that, after the 1966 detachment, the expected tax poverty of the district would make

¹⁵ Like other volunteer fire departments that are sustained mainly by tradition and local civic pride but by a very meager tax base, Bay Point district experienced detachment of precisely that area which would have increased in assessed valuation.

¹⁶ These supervisors, fearful of the political power of the industries in the county, were unwilling to include the industrial plant in the annexation.

fire protection service prohibitively expensive to the remaining three hundred residents. He suggested the area could receive better protection for considerably less cost if it were served from the nearby Consolidated station in Concord. Later when potential opposition from the Bay Point volunteer fire fighters surfaced, Consolidated agreed to maintain a volunteer-manned station in the unincorporated hamlet of Clyde. The only opposition was from the volunteer chief who was not offered a position in the Consolidated district. Nevertheless, his directors had been carefully pre-sold and they ignored him, voting 4-1 in favor of the change. On this basis the annexation was approved.

First End-Run of a Fire Commission

The annexation of the Lafayette autonomous fire district came less than six months after Lafayette incorporated as a city. By state law, the new city council was empowered to decide on the source of its fire protection service, and it voted over the weak opposition of the autonomous fire commission to annex the fire service to Consolidated. (See Map 10).

Climate for Change

The annexation effort began during the 1968 incorporation campaign, which centered on the issue of local control over planning. The instigator informed the incorporation campaign leader, who was himself a candidate for the city council, that a newly incorporated city possessed important statutory powers over special districts during the first year after incorporation. The candidate, aware of the incongruity between a campaign to

create a new local government and divestiture of the locally controlled fire protection service, cautiously raised the question of reallocation during the campaign. He was surprised at the lack of voter response. From this he concluded that there was no pre-determined citizen opposition to fire service reform.

Following city incorporation in July, 1968, fire protection became the first major item of business before the new city council. It was known that the fire chief was approaching retirement and that the tax rate was rather high.

The Campaign Begins

When the incorporation leader became Mayor he formed a nucleus of local reformers. After they had begun low level discussions to assure themselves that they faced no insurmountable barriers in their own community, they persuaded the newly elected Council to appoint a seven-member pro-consolidation study commission to depoliticize and objectify any reallocation proposal. The committee's pre-public exploration of the political terrain lasted less than one week and involved non-threatening conversations with the president and other directors of the Lafayette fire commission and the fire chief.¹⁷ Dismayed at the proposed annexation, the Lafayette directors, nonetheless, initially cooperated with the reformers on the assumption that some kind of reallocation was an accomplished fact. The opposition came from the retiring

¹⁷ The fire commission members called themselves directors.

MAP 10



chief who, echoing an earlier suggestion, recommended a merger with the Moraga and Orinda districts. One vocal, but unpersuasive, Lafayette director who obtained considerable media coverage also opposed annexation.

The Citizens Committee

The citizen's study committee was given a mandate to recommend to the city council one of four alternative sources for fire protection service: a city fire department; an autonomous fire district; annexation to Consolidated; or merger with Orinda-Moraga. Meeting twice a week, the advisory committee interviewed the Lafayette fire directors, a sample of the fire personnel (who later supported annexation 31-3) and top officials, the Consolidated chief and members of his commission, the LAFCO executive secretary, and a Pacific Fire Rating Bureau engineer. The committee was surprised to discover that the greatest benefit of annexation to Consolidated was a significant improvement in the level of service rather than what had been previously considered the prime benefit, an impressive decrease in the tax rate. That finding, stressed in the final report of the committee and published as a supplement in the local weekly newspaper, was much more important to a prosperous residential community like Lafayette, and the Council voted unanimously to annex to Consolidated.

Consolidated's Concern

The request for annexation was almost defeated by Consolidated when two commissioners, one from Clayton, who resented

losing his seat to Lafayette, and another from Walnut Creek, voted against annexation.¹⁸ The fire fighters union, trying again to improve its position, also opposed the annexation. The proposal did not carry until the Consolidated chief who, at times, was placed in a difficult position with his own commission, persuaded three members of the advantages of annexation to Consolidated, notably, the lack of necessity to build another fire station near the Lafayette boundary.¹⁹

The question of Lafayette's bonded indebtedness for a new fire station was resolved when the LAFCO executive secretary showed that the 7¢/\$100 AV levy, assessed to retire the bonds, could legally and practically be spread over the expanded Consolidated district at about a mill/\$100 AV rate increase. The opposition of the fire fighters union was also neutralized when the commissioners and, indirectly, the Supervisors, agreed to one of the union conditions in the upcoming round of negotiations. Then, LAFCO voted unanimously in favor of the annexation in early December even though the Supervisor from Concord was philosophically opposed.²⁰

¹⁸ In 1964, Consolidated was established as a five-member board with one member from the incorporated area and four city appointees by the largest cities. In 1968, Martinez had become the fourth city but agreed to let the Clayton member serve out his term. Clayton's member voted in loyalty to the agreement with Martinez.

¹⁹ The chief retreated from his active annexation philosophy stating that "annexations should be considered one by one" and that he "would not recommend the annexation of Orinda now ... but we are not talking about politics, we are talking about property, economics and lives."

²⁰ He believed that there was little community interest between Lafayette and Consolidated and that a Lafayette-Moraga-Orinda consolidation would be more beneficial to these three districts. Also a Lafayette annexation to Consolidated would set the stage for annexing Orinda and Moraga, a possibility he anticipated with mixed feelings. Yet, he supported the annexation upon the request of the local Supervisor.

Unexpected Problems

The Lafayette fire commission had earlier promoted its assistant chief to chief, effective January 1, 1969, to frustrate the reformers, but the commission did not obstruct the reform effort in any other way until after LAFCO approved the annexation. In early December, the lame duck commission voted to return \$45,000 in reserve funds to its constituents. Consolidated immediately reversed its approval of annexation. At this point, Lafayette reform leaders responded to forestall this action by having the city council unanimously resolve to indemnify Consolidated against any financial loss. The council also pressured the Lafayette directors to withdraw their vote. On December 1, dumbfounded by the speed with which the reformers had acted, the directors unanimously voted to support annexation and withdrew all stumbling blocks. The Board of Supervisors ordered the annexation unanimously.

Consolidated Rejects Its First Annexation

Immediately after the Lafayette annexation, the local Supervisor for Orinda instigated an annexation effort by appointing a study committee. The annexation effort was killed when Consolidated released a negative report on the proposal four days prior to the expected release date of the Orinda report. (See Map 11).

Climate for Change

In 1966, a study was conducted by a citizens advisory committee appointed by the local Supervisor, who had only shortly before been instrumental in the merger of the Crockett-Carquinez

MAP 11



district. The report developed by the study recommended the annexation of the Orinda Fire District to Consolidated at about the same time that the community was undergoing an incorporation campaign (which failed in 1967 by a margin of 3-1) and at a time when Consolidated was pursuing annexation of the Eastern Fire District. No action was taken on this report.

In 1969, the local Supervisor again believed that the climate was right for annexation because the Orinda district had now become contiguous to Consolidated. With this in mind, he proceeded with his strategy.

The Campaign Begins

Without utilizing the instigator or reform nucleus from earlier campaigns, the local Supervisor hoped to make use of the conclusions from the locally prepared study. In addition, he assumed it to be in Consolidated's philosophical interest to bring about another successful merger. He asked both the Consolidated commission and chief and the Orinda Fire District Study Committee, appointed by him through the Orinda Chamber of Commerce and the Orinda Association, to conduct feasibility and desirability studies of annexation. Cognizant of possible opposition by conservative supporters in his district who felt very strongly about home rule, he publicly declared he would wait for the study group's report before he acted. However, while this move covered his political flank, it suggested to the already ambivalent Consolidated commission an absence of any strong pro-annexation leadership in Orinda, thereby undermining Orinda's case before the favorably inclined Consolidated commissioners and chief.

Reasons Behind Rejection

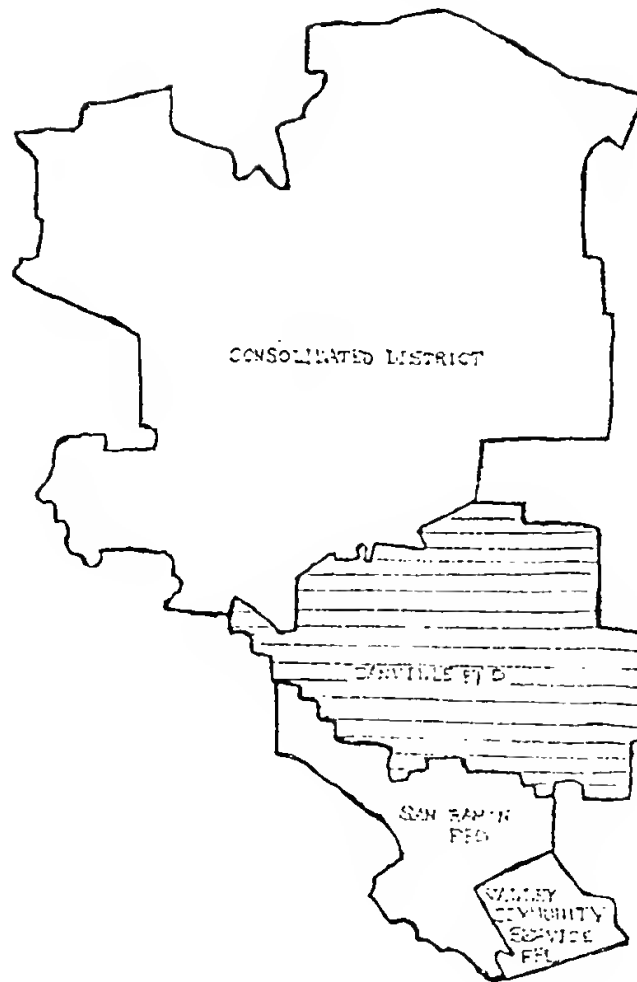
Burdened by the economic recession of the late 1960's, a leveling-off of growth in the central region, and continuing demands by the fire fighters union for better salaries and benefits as well as additional manpower, the Consolidated commission had begun to assert a "serve the existing district first" philosophy that previously had been a minority position. The failure of the Orinda annexation also served warning that reform initiated by an outsider without the help of the original reform nucleus was difficult to accomplish. It also indicated that Consolidated was not only interested in fire protection but also cost. Finally, the refusal showed that Consolidated, which had become closely tied to the cities by virtue of the compromise system of representation established in 1964, could now veto an annexation that might be requested by the instigator of the reform nucleus.

Defeat of an Autonomous District Annexation Proposal

Instigated by the same Supervisor involved in the Orinda case in 1969, the Danville autonomous fire district annexation proposal stalled in short order when Consolidated indicated lack of interest in annexing Danville proper rather than the entire Danville, San Ramon Valley service area. (See Map 12).

The local Supervisor undertook the Danville effort simultaneously with the one in Orinda when a slump in the growth of the Danville area (which indirectly led to a 5¢/\$100 AV tax increase), convinced him that this would create a sufficient climate for change.

MAP 12



The Campaign Begins

The Supervisor first formed an ad hoc annexation committee to study alternative means of fire protection service. This committee enjoyed the support of the autonomous Danville fire district directors. Anticipating the effect of the tax increase on their own upcoming reelection efforts, they instructed their personnel, who opposed any reallocation and especially annexation to Consolidated, to remain neutral about the merger and to provide objective information when requested. The Supervisor then approached Consolidated officials, who utilized the fact that the study group represented no official body (such as the fire district) to sidetrack the request for a discussion of the feasibility of annexation.

As in the case of the Orinda proposal, there was no pre-sell but rather a head-on effort by the Supervisor to seek a decision from Consolidated. The reformers were surprised to learn that the Consolidated officials, who were acknowledged incrementalists during the mid-1960's when there was maximum growth in the area, had, by 1969, become maximalists who were quite ready to annex the complete San Ramon Valley. Clearly, Consolidated wanted the high growth southern area. The Danville reformers were aware of the benefits that "lesser" jurisdictions had enjoyed through annexation to Consolidated, such as a lower tax rate, greater first alarm response and back-up, and better training in fire protection. They were, therefore, surprised when Consolidated's officials made no promises, offered no conditions, and, in short, showed total disinterest. Momentum diminished and a

press release by the reform leader indicated that "Consolidated officials are unwilling to meet with Danville study group ... "

First Defeat by Election

The effort to annex Moraga was also initiated by the same local Supervisor after the successful Lafayette annexation made this area contiguous to Consolidated. After the instigators acquired substantial support from local officials and the fire establishment, the opposition called an election and defeated annexation by a better than 2-1 margin. (See Map 13).

Climate for Change

The Moraga Fire District (until 1966 the western part of the Eastern Fire District) had been the subject of reallocation discussion since the creation of Consolidated because of its high growth rate and incongruous location relative to the rest of the Eastern District. A "county" fire district, it again became the topic of a reform effort in 1969 when it became contiguous to Consolidated and the local Supervisor requested the Moraga fire commission, the Moraga Community Association, and Consolidated to examine the possibility of annexation.

The recently appointed pro-annexation chief, who had been hired from Consolidated to increase the professional level of the Moraga Department, recommended the annexation to his fire commission. That commission agreed 3-2.²¹

²¹ One of the members had been a central district commissioner in the original consolidation in 1964 and another member received contracts from the Consolidated district to clear its fire trails.

MAP 13



Study Commission

In March, 1969, the Moraga Community Association, a strong supporter of the local Supervisor appointed, from among its membership, a nine-person fire protection study committee. After three formal and several informal meetings in which it reviewed the Lafayette annexation and unfavorable Pacific Fire Rating Bureau reports on Moraga, and interviews of seven persons, this group wrote a report, characterized by political and technical sensitivity, that strongly recommended annexation.

The report not only pointed to the relative weaknesses and strengths of the fire department on the basis of a comparison of tax rates, levels of service, and expectations, but also attempted to channel the discussion that was expected to materialize concerning the disestablishment of the only local governmental authority in Moraga. It noted that opposition would come from self-interested large land owners who opposed the extensive Consolidated weed abatement program and from certain insecure Moraga Fire Department employees who feared that annexation would deprive them of promotion in the better trained Consolidated district. Local control, the report went on to observe, did not realistically imply community involvement at fire district meetings, which were unattended by the public, or support of the volunteer firemen's program, which was being phased out for lack of interest. But the report offered no suggestion as to how to deal with the paramount question of unusual civic pride in the only local government authority that served only the Moraga residents. It also stepped on some toes by suggesting that it was not the function of professional fire

departments to provide public service programs such as retrieving animals, registering voters or playing Santa Claus.

The study report failed to note (nor did the local newspaper that provided extensive coverage of the reallocation campaign) that annexation was also a vehicle for the young, aspiring Moraga chief to return to Consolidated where he had served in a battalion the year before as an assistant chief.

In early May, Consolidated unanimously approved its chief's recommendation to annex Moraga.

Momentum for an Election

The Board of Supervisors postponed action at the request of the Supervisor for Moraga to give him time to reconcile two warring factions within the Moraga Community Association who had split over earlier endorsement of annexation. The Supervisor failed to bring these groups together and at the following Board meeting, opponents to the annexation, including several homeowners groups, announced that they were circulating a petition to force an election. The Board took no action.

LAFCO, at its August and September meetings, also heard opponents suggest that Consolidated was seeking a plum and that Moraga would never receive representation on the Consolidated commission because of its population. After noting that there was, indeed, substantial discussion in Moraga, and that the local community association had announced a public meeting for the end of September, LAFCO voted unanimously to approve annexation. The instigator had used his position as executive secretary well.

LAFCO designated the community of Moraga as the area where an election would be held, if required. Shortly thereafter the petition circulators claimed signatures of five percent of the citizen population in the fire district and the Board of Supervisors scheduled an election for the following November.

Emotional Changes in the Campaign

Several hundred people attended the confrontation at the September public meeting that the local community association had scheduled. Perceived by most of the reformers as a forum for educating the Moraga electorate, the evening was turned into a rout by opponents. They pressed their emotionally charged political slogans of local control and capitalized on two recent delayed emergency responses from Lafayette as indication of Consolidated's "overrated" level of service.

In November, the Moraga fire commission made public a new report by its chief which refuted the "erroneous statements" made at the public meeting. The former chief also indicated his support of the annexation proposal in a letter to the editor. But "educated" reformers had already acknowledged that annexation in Moraga had passed beyond the point of rational discussion with the election still nine months away. The Consolidated chief attempted informally to convert one of the opposition leaders by providing him an extensive tour of Consolidated's sophisticated facilities. That attempt at logical persuasion failed, however, and the opponents conducted their own fire protection study.

During the Fall and Winter the battlelines were more fully drawn. Opponents collected a war chest for the public

campaign prior to the primary election, signed up local citizens to walk precincts, rang doorbells, and distributed literature. The proponents were notably lethargic, and active campaigning did not begin until the fire fighters union was won over by the promise of a shorter work week. This brought forward contributions of money and precinct walkers. However, the Moraga chief applied too much pressure on certain opponents within his own department and as a reaction to this pressure these individuals and the volunteer firemen actively joined the opposition campaign.

Just before the election, the campaign grew heated and highly emotional when the opponents charged misrepresentation of the facts by the reformers, and the reformers complained to the sheriff that their signs were being torn down. Finally, the labor union began a concerted precinct campaign and brought Consolidated fire fighters into Moraga. This had the effect of arousing new suspicion since Consolidated had just refused the annexation of Orinda. The opponents publicly questioned why Consolidated "wanted Moraga so badly."

The Election

On election day the electorate overrode the recommendation of its Supervisor, fire chief, fire commission, and local newspaper as well as the external advice of the County Taxpayers Association, the LAFCO executive secretary, the Consolidated chief and commission, and the central county fire fighters labor union defeating the annexation proposal by a margin greater than two to one.

Mini Annexation

County Service Area #5, a district with neither a fire department nor a commission and a population of less than fifty, was formed in 1967. Since its inception, fire protection has been furnished on contract by Consolidated. (See Map 14).

Although the service area was ripe for annexation through the 1960's, it was not until the instigator suggested to the Consolidated chief that annexation would normalize the boundary of the Consolidated district that annexation proceedings were initiated. The only barrier had been inertia and once it was overcome, LAFCO and the Supervisors unanimously ordered the "obvious annexation" in 1970.

A Mountain District Requests Annexation

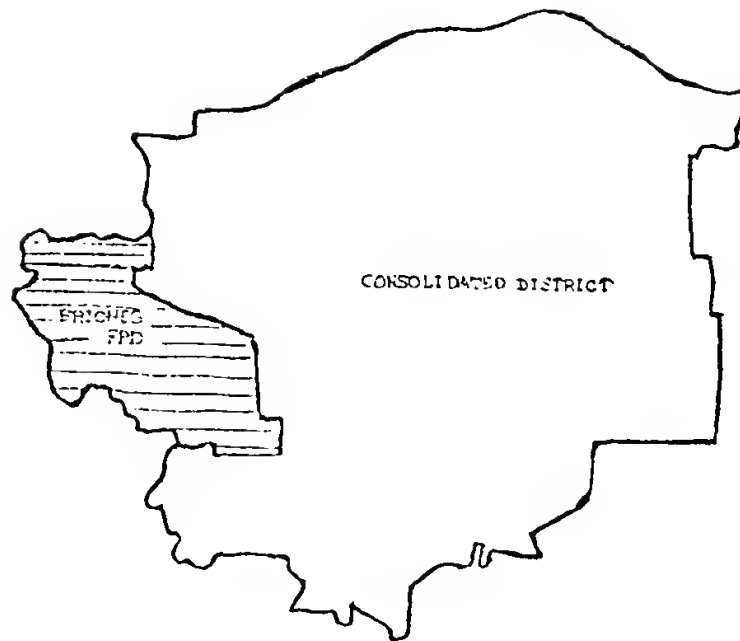
Annexation of the Briones County Fire District came in August, 1971 after the Briones commissioner petitioned the Board of Supervisors. (See Map 15).

A detachment to Consolidated (the area to the right of the broken line on the map) of roughly one-third of the Briones district occurred in 1970 at the request of the State Department of Parks and the Girl Scout Camp located in that area. This provoked the instigator to question the Briones commissioners about their inability to protect the grass lands and a few, very expensive homes in the district. The district had a low budget volunteer force and would have had to drastically increase the tax rate to provide an adequate level of service. Annexation to Consolidated was the viable alternative. The instigator then convinced the

MAP 14



MAP 15



Consolidated chief of the benefits of annexation.²² In May, 1971, the Briones commission initiated annexation proceedings to Consolidated.

Unexpected Opposition

Discussed by LAFCO in May, June and July, 1971, the proposal met with unexpected opposition from one Supervisor from the western region who had recently fought hard to table a consolidation proposal for western Contra Costa suggested by the instigator. This Supervisor, joined by the city manager of Pinole, a western region city of 8,000, proposed that Briones be annexed to Pinole's fire department, citing similar topography as a reason. They noted that small and costly jurisdictions should inevitably be consolidated for economy and efficiency, but they argued that a fire district may also become too large. Consolidated, the largest jurisdiction in the county (200 square miles), represented a case in point of such a district, they maintained. Consolidated replied that, in comparison to other fire districts in California, it was of barely moderate size and that it would only agree to taking the eastern portion of Briones if it could "absorb" the entirety. LAFCO agreed, and recommended annexation 4-1.

Although the opponents repeated essentially the same argument before the Supervisors in August, the Board ordered the

²² The area required little investment beyond communication lines to link the two districts and acceptance of the volunteer fire chief as a senior fire fighter in the Consolidated district. They would then service an area in which considerable growth was expected.

annexation without an election 4-1 on the grounds that Consolidated could offer much better service to Briones than Pinole could.

Annexation of a City Fire Department Fails

The proposal to have Consolidated annex the expensive and long neglected Pittsburg Fire Department was made in the Fall of 1971 by a reluctant city council after a preferred merger with the City of Antioch had stalled. The Pittsburg annexation proceedings were themselves stalled in 1972 when the Board of Supervisors, at the insistence of the Consolidated commission and its member cities, vetoed a "Pittsburg-only" annexation as financially infeasible. (See Map 16).

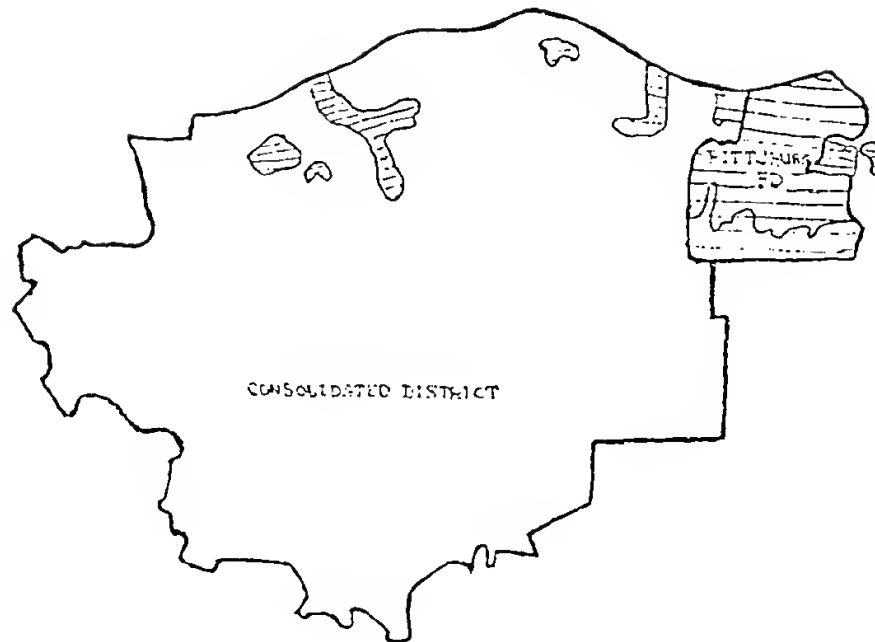
Climate for Change

Fire service reallocation became topical among local government officials in the urban fringe of the Eastern region in February, 1970, when the staffs of the financially pressed cities of Pittsburg and Antioch began to examine the possibility of reallocating sorely needed revenues to other functions through divestiture of their inadequate fire departments. The reform-minded Pittsburg city staff persuaded its council of the efficiency of exploring alternatives. When later joined by Antioch, they requested that LAFCO conduct a fire protection study of the area.

LAFCO Report

LAFCO's June, 1970, report recommended a single district serviced from five stations instead of the nine that would be needed without consolidation. The report excluded from this plan

MAP 16



the local industries, twelve of which had been exempted from any fire jurisdiction by the Board of Supervisors in 1952 and were desperately intent on retaining this status. It also failed to mention, specifically, annexation to Consolidated as an alternative. Either suggestion would have created a politically untenable situation for the reform leaders.

In addition to detailing the economies and efficiencies to be gained from a consolidation, the report sought to facilitate reorganization by outlining five alternative means of governing the proposed district, since governing the district was considered to be the most important barrier to change in this case. The alternatives mentioned were the following: first, a joint powers agreement in which the jurisdictions would be formally, if not in fact, retained; second, a district governed by the Board of Supervisors through an appointive commission much like Consolidated; third, a district governed by a body appointed by the Supervisors; fourth, a district with a governing authority appointed both by the Supervisors and the City Councils; and fifth, an autonomous district with elected commissioners.

The proposal to create an "Eastern Contra Costa Consolidated Fire District," even if it initially did not include the industries with their \$240,000,000 assessed valuation, had certain implications. It meant that Pittsburg and Antioch, cities that both saw themselves as outside the demographically and historically different central region, would remain out of Consolidated. Although a new Eastern Consolidated District conflicted with the earlier strategy to have only one urban fire district in the

central/eastern area, the instigators concluded that a separate eastern consolidation was the best that could be achieved. The "lesser" merger was informally approved by LAFCO.

Setback

Discussion about consolidation stalled, however, when the Pittsburg reform leaders were unable to elicit any immediate action from their own city council before upcoming city elections. In the meantime, the Antioch city administration, confronted by a police "work action," successfully campaigned for a one dollar tax over-ride to improve public services. With this new revenue, the Antioch fire officials, who had previously supported reallocation because they expected to become the commanders of the reorganized district, now turned a deaf ear to the Pittsburg overtures. Both Antioch politicians and firemen now stressed the "full city service" philosophy, and argued that they could not possibly divest their fire department shortly after the local electorate had expressed its confidence in them by a majority of nine votes!

Proposed Annexation to Consolidated

Pittsburg continued to be faced with financial problems and the Pittsburg city staff in late 1971 proposed annexation to Consolidated. This alternative was attractive because of Consolidated's much lower tax rate (a reduction of 64¢/\$100 AV), and because the city council could offer "tax reduction" while retaining money for other functions. Annexation to Consolidated was also now thought to be politically feasible if the proposal were to

exclude the industries which had considerable influence in Pittsburgh. Although the Pittsburgh reform leaders knew that Consolidated had already broached the matter of including industries in the Martinez annexation, they hoped to circumvent this issue using the support of their local proposal. Moreover, in late 1971, the Pittsburgh reform leaders conceived their major problem not as one involving the attitude of Consolidated but rather getting their own city council moving to allow the proposal to come before LAFCO, the Board, and finally the local electorate. The reformers believed an election would be a precedent condition for Council endorsement.

On a 3-2 vote, Pittsburgh's city council initiated annexation proceedings. The reformers then appeared before LAFCO where they learned that Consolidated would approve their proposal, provided that Antioch, two contract districts, and all the industries from Martinez to east of Antioch be included in the merger. Consolidated's stance reflected in large measure the long standing opposition by cities in Consolidated to continued "subversion" of Consolidated by lesser districts. Consolidated had voted 3-2 to oppose a Pittsburgh-only annexation, believing their action represented the last chance to force the industries to share the cost of fire protection. LAFCO knew that Consolidated's proposal would force Pittsburgh's City Council to kill the annexation and accordingly steered a path through this maze of local government rivalries to recommend 4-1 a Pittsburgh-only annexation.²³

²³ The opponent was a city councilman from Pleasant Hill who supported Consolidated. The others had either been lobbied by the local Supervisor or sensed that they should take a position that cut through the political jockeying of Consolidated.

The LAFCO executive secretary had attempted to mediate between Pittsburg and Consolidated by suggesting that the Consolidated position be modified to exclude P. G. & E. and U. S. Steel, the two corporations with members on the Pittsburg City Council and those most vigorously opposed to inclusion. Although both sides agreed to this suggestion, LAFCO still recommended a Pittsburg-only annexation.

At the Board of Supervisors' hearing the LAFCO executive secretary's proposal surfaced during the wide ranging discussion on the original proposal but it was rejected when the two industries opposed even this idea. The local Supervisor assumed he had three votes for a Pittsburg-only annexation, but they melted away under the combined opposition of the two Pittsburg councilmen and the cities in Consolidated. The two Supervisors from Consolidated successfully won over one philosophically pro-consolidation member from the western region who had himself only recently fought an unsuccessful reallocation campaign. Perceiving defeat of the measure, the remaining Supervisor voted with the majority and Pittsburg's request to become the seventh annexation to Consolidated lost 4-1.

Pittsburg and Antioch Renew Consolidation Discussion

A Pittsburg-Antioch Industries consolidation effort was resumed by the Pittsburg city staff when industry executives, fearful of adverse publicity, reversed their stand after the educational Pittsburg-only annexation failure. After initial public disclosure in the Pittsburg newspaper in the Fall of 1972, the

reallocation effort has proceeded informally at the insistence of an Antioch city administration which fears adverse publicity and is ambivalent about a reorganization of fire departments at this time. As of this report, the consolidation proposal is still pending. (See Map 17).

Climate for Change

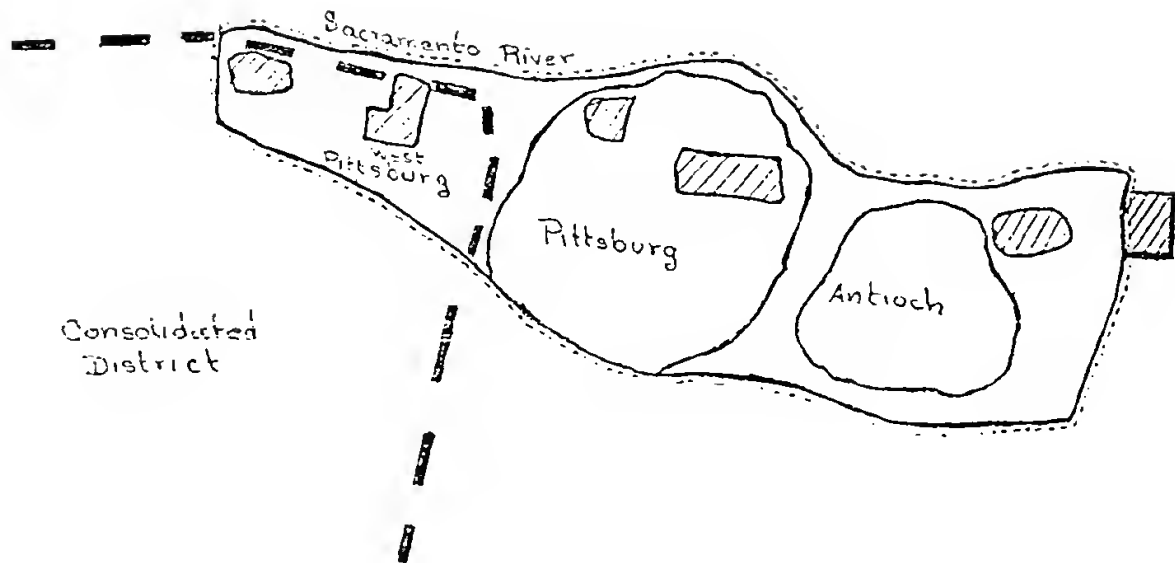
Not only the political, but also the economic climate has changed in favor of a merger as the industries have emerged from the late 1960's economic recession and have had time to analyze the meaning of fire jurisdiction merger. Industry expects either to be rid of the fire protection business through a subsidization of a local district or hopes to improve the fire protection service of its plants (and concomitantly the neighboring communities) through a consolidated district in which it would have a major decision-making voice. The Pittsburg fire chief has agreed to retire before becoming embroiled in an emotional campaign around this issue.

Only Antioch, still claiming a message from the 1970 campaign, is disinterested. Antioch is willing, however, to provide information necessary to establish the rational basis for a merger discussion that ultimately may be expected to lead to an election by the citizens in the area.

The Campaign Begins

On the recommendation of the instigator the reformers have hired a consulting firm to objectify the conclusions reached by the 1970 study. Whether or not the present study merely

MAP 17



Legend:

////// Industry

--- Boundary of Proposed District

--- Boundary Consolidated District

duplicates the earlier study or represents a new ground breaking effort, fire service organization for both industrial and residential-mercantile structures will tell a great deal about the kind of district that the reformers agree to propose. In any case, it is expected that the industries, whose assessed valuation will contribute the overwhelming portion of the tax revenues for the district, will have a major if not decisive say in its policy decisions.

The proposed consolidation may be expected to be successful because the reformers have the financial resources which are attractive for all involved. It is not impossible that the new consolidated district will be able to materially upgrade the fire department, free money for improvement of water services and also have a lower tax rate than Consolidated.²⁴

An Early and Logical Consolidation

The Western region consolidation of two traditionally rival and ethnically different volunteer fire districts, Crockett and Carquinez, occurred in November, 1965 when a freshman Supervisor unilaterally forced the merger.²⁵ (See Map 18).

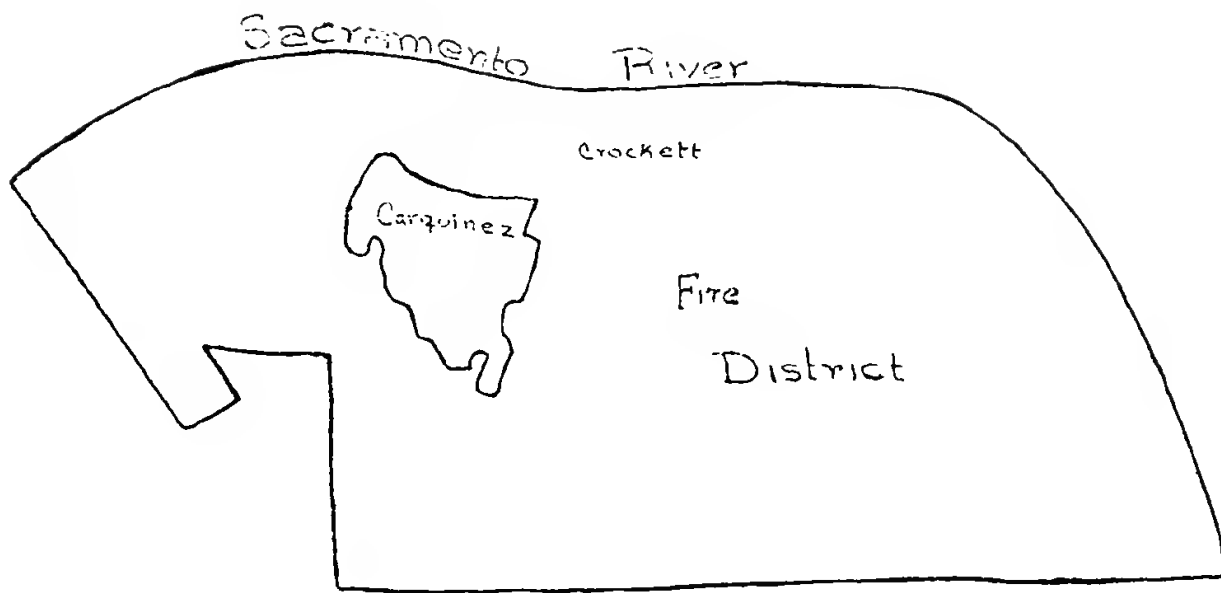
Provoking Action

Although the consolidation of two fire districts, whose boundaries originally corresponded to two actual communities, had

²⁴ Creation of a Pittsburg-Antioch-Industry fire district may have a spillover effect and force the industries in Consolidated's territory. It would be ironic to see Consolidated pick up its own industries after it refused Pittsburg's request believing that Pittsburg's annexation depended on including the industries.

²⁵ This consolidation was the only one to occur in Contra Costa outside the central region.

MAP 18



been discussed for years in this now single small community (population 4,3000), it had been regularly opposed by the traditional fire commissions. When one of the two local industries closed, drastically reducing the assessed valuation of the Crockett district, and when the long-time volunteer fire chief of Crockett announced his retirement, a newly elected Supervisor approached both commissions and their officers to tell them that he favored a consolidation, but would not force it upon them. Rather, he would let the two commissions work out the administrative details of a merger. When their discussions stalled, the Supervisor suggested that Carquinez should have two commissioners and Crockett should have three commissioners in the new district and that the four chief officers from the two districts should divide the area into four divisions under the command of a chief. The proposal was generally satisfactory to all parties involved. Some emotional opposition which emerged was outmaneuvered by the Supervisor and the local officials who expected to benefit, and when the merger proposal went before the Board of Supervisors there was no opposition. The Board ordered consolidation of the all volunteer districts without an election.

Problems in the Western Region

The effort to consolidate six fire service jurisdictions in the highly heterogenous western region of the county was initiated by a combination of county level and city reformers, partly as an attempt to duplicate the "shining example" of the central county consolidation proposal. This effort fragmented in 1971 when the

opposition from the old-line San Pablo fire district convinced the instigators that they did not have a sufficient nucleus in the western region to maneuver a six-unit consolidation. (See Map 19)

Earlier Efforts

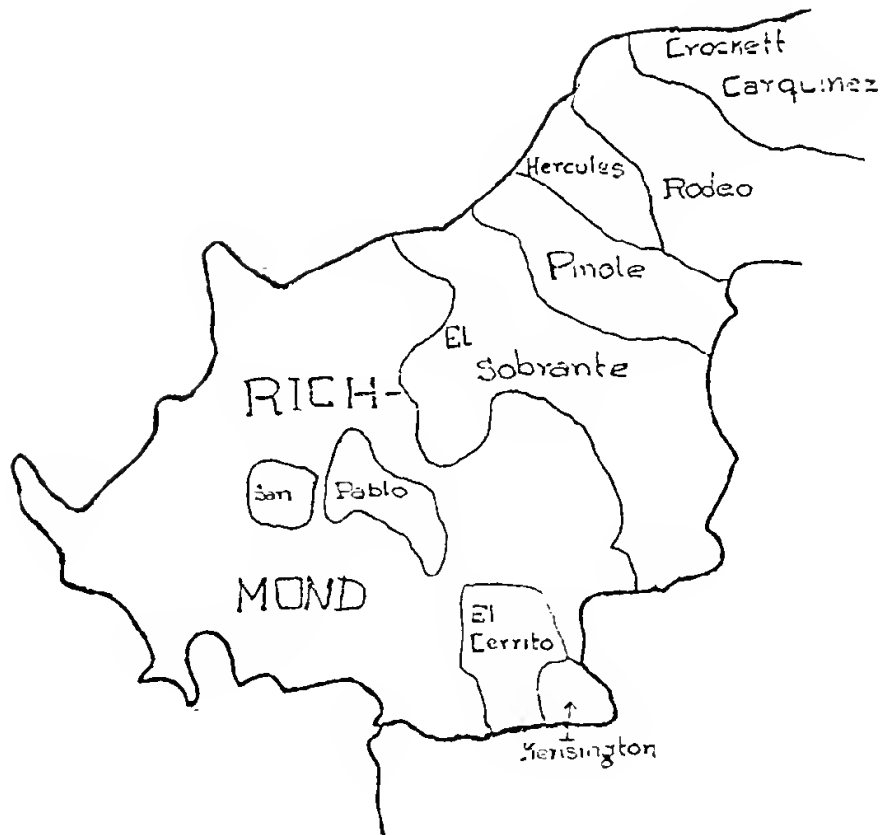
Discussion of fire service reallocation had begun shortly after the original consolidation in the central region in 1965. In 1966, the instigator, working through the County Administrative Officer, presented a report to the Board of Supervisors recommending a consolidation of the San Pablo and El Sobrante County Fire Districts. The proposal was killed when the Supervisor for San Pablo, a city from which he derived much of his political support, learned that both fire district officials and the city government were adamantly opposed to such a merger. San Pablo fire district had been formed in the 1920's for the express purpose of keeping Richmond out. In 1970, the district even considered creating a city fire department if necessary. The idea favoring consolidation was dropped when the Supervisor successfully stalled the merger recommendation.

New Interest

In the late 1960's the cities of El Cerrito and Richmond were increasingly hard pressed for revenue. After the city manager of El Cerrito transferred to Richmond, the two cities, together with a reform-minded political commission from the autonomous Kinsington Fire District,²⁶ asked the LAFCO executive secretary

²⁶ The commission had been pre-sold after countless discussions with the instigator who had pointed out their indefensible tax rate.

MAP 19



to conduct a western region fire protection study to help lay the groundwork for region-wide consolidation. The LAFCO report was written to capitalize on the moment, much like the eastern region study mentioned in the Pittsburgh case. The report provoked the Supervisor from Richmond who, in the meantime, had been contacted by the city administration, to oppose a consolidation of all fire districts. Following this, the city councils, fearful of potential opposition that fire departments could muster in the upcoming election and, unable to arrive at a unified stance because of the deep-seated intercity rivalries, fears and hatreds, suggested that the LAFCO study was too biased in favor of consolidation.

Consultant Report

The instigator and the western region nucleus which, by the late 1960's, included the city managers of El Cerrito, Richmond and one Kensington fire commissioner, played on the pro-consolidation sympathies of the Board of Supervisors and encouraged them to vote a few thousand dollars in seed money. When they obtained the money, they approached each of the six jurisdictions requesting a fair share matching contribution to fund an "objective feasibility study" by a professional consultant. San Pablo was initially unwilling to contribute. The local Supervisor, however, persuaded San Pablo not to oppose "finding the facts," assuring them it was better to have a voice on the inside than none at all.

Released in late 1970, the study was essentially an elaborate repetition of the LAFCO study, but it also made a number

of "ideal" recommendations, and suggested three alternative merger proposals. The opposition, incensed that the consultant would suggest who the chief of the proposed district should be, began to criticize the report. General feelings of hostility permeated the discussion as each opposition official found minor or major points of the study to attack, and the San Pablo supervisor sided with the opponents.²⁷

Modified Strategy

Without a friendly or neutral local supervisor on the scene, the reformers were unable to overcome the position of the fire establishment. The reformers retreated to the seemingly more feasible strategy of consolidating the three "willing" jurisdictions of Richmond, El Cerrito and Kensington. But upon opening discussions in those communities, they found that anti-consolidation sentiment existed, especially in El Cerrito. The sentiment in El Cerrito stemmed from an earlier poorly handled attempt to close one fire station and the fear that Richmond personnel would dominate an inferior-status consolidated department. Faced with this opposition, the reformers retreated yet one step further. They suggested that reallocation of the fire service function in western Contra Costa should begin with a joint-powers agreement to functionally unify the three fire service jurisdictions. From that

²⁷ Many of the "ideal" recommendations were those that are more suited for new towns than established communities. The report was strikingly insensitive to political realities. For example, fire station locations were suggested without even the slightest thought of mollifying the individual jurisdictions.

beginning, which was expected to mushroom into a consolidated district in 1974, the reformers hoped to be able to annex the San Pablo district by a judicious cancellation of a several hundred thousand dollar contract on the basis of which San Pablo provided service to Richmond territory. This contract could be cancelled because a consolidated Richmond-El Cerrito-Kensington district would be able to serve this area, thus putting pressure on the San Pablo district to justify its own existence.²⁸

That functional consolidation strategy, however, is already stalled over El Cerrito's refusal to share in the payment of a joint communications system with Richmond.

LACO has, in the meantime, proposed a consolidation of the Pinole-Rodeo-Hercules district. Suggested mainly to provide a stable revenue base for these three marginal, but growing, jurisdictions, this new thrust has undermined a Richmond-initiated maneuver to consider a district with Pinole, El Sobrante, El Cerrito and Kensington.

Even though a 1972 county grand jury report also recommended consolidation in the western county, the consolidation of districts across supervisorial lines seems to be stalled until the supervisor for San Pablo becomes a member of the reform nucleus or until the climate produces conditions which favor the present reformers' change plan.

²⁸ Upon realizing an annual budget reduction of \$18,000, San Pablo might decide that fighting a losing battle to stay in the fire protection business is just too expensive.

Status

By the summer of 1973, central Contra Costa was receiving service from Consolidated and the only "logical" annexations appeared to be Orinda, Moraga, or the San Ramon Valley, none of which seems to be under consolidation. In the east, the Pittsburg-Antioch-Industries consolidation is still pending. In the west, pressures are continuing to consolidate all or at least some of the nine jurisdictions.

CHAPTER FIVE

SACRAMENTO CITY -COUNTY CONSOLIDATION PROPOSAL

The Setting

A Sacramento Citizens Committee, formed in 1972, is presently preparing a proposal to reorganize the County, the metropolitan city, ten unincorporated suburban communities, and one hundred twenty-eight special districts into a single, general-purpose, two-tier consolidated government. The committee proposes to place a series of charter amendments before the voters for a county-wide election in November, 1974.

Previous Reform Attempts

Sacramento has a history of local government reorganization efforts that have stalled at the discussion stage because instigators found that the citizens generally approved of the quality of existing services. Given this situation, the instigators have been unable to overcome the real and imagined barriers posed by state law and a traditional local political elite.

Sacramento did, in fact, have a short-lived consolidation of the City and County in the late 19th Century in response to a need to broaden the tax base for the construction of levees to prevent flooding. Ten years following the implementation of this consolidation, the demand by city dwellers for more levees was unsupported by country residents and the consolidation was dissolved. Consolidation discussion did not begin again until after World War II, at which time, due to Sacramento's rapid

growth, three phases of activity occurred. This activity culminated in the present charter attempt.

Phase 1

The Metropolitan Chamber of Commerce responded to the concern of its members that the city was losing tax base through the mushrooming suburbs and, in 1947, advocated a city-county merger for purposes of efficiency and economy. If effected, this merger was expected to create a broader tax base for the city which was overwhelmed by state-owned tax-exempt properties and basically without industry. This proposal, however, faltered when the suburbanites almost unanimously expressed their opposition to joining a city they had just left, and when the Chamber of Commerce, which had done little politicking, found itself without official support from either the city or the county.

A new effort to reorganize local government was launched in 1955 when the cities of Sacramento and North Sacramento, and the county, all increasingly pressed by financial problems, accepted a Chamber of Commerce suggestion to appoint a Citizens Committee to study the feasibility of reorganization. Confronted with a maze of unanalyzed data, the Committee used monies appropriated by the three jurisdictions to engage a Chicago consulting firm to conduct an objective feasibility study. The firm's 1957 report unanimously recommended consolidation of the urban-suburban (but not rural) Sacramento area. But activity faltered when the reform leaders concluded they lacked both time and money to overcome a most formidable barrier, the California

Constitution, a barrier which required either numerous local elections or a constitutional amendment.

The proliferation of special function governments, to which city and county officials were especially sensitive, prompted additional efforts to reorganize. There were four studies between 1957 and 1971, and they covered a range of political alternatives within the county. These were:

1. Initial, comprehensive, all at once urban-suburban merger (1957);
2. Reorganization in the metropolitan area through progressive stages (1959);
3. Merger through annexation to the City of Sacramento (1961);
4. Functional consolidation of line departments (1966);
5. Single urban government (1969).

The chief value of these studies for present-day reformers is that all of them recommended an eventual single general-purpose government for the metropolitan Sacramento area.

Phase II:

In 1970 and 1971, the climate for change improved. The stage had been set in 1967 when LAFCO killed a proposed incorporation of a third city in the northeast suburban portion of the county and shortly thereafter allowed North Sacramento to annex to Sacramento. A Citizens Committee, formed after the defeat of the new city incorporation, recommended consolidation of the city and county. It now appeared that suburban opposition to such a reorganization was not universal.

The Chamber of Commerce and one of the members of the Board of Supervisors still supported consolidation but, even with some support on the City Council, they were unable to establish a nucleus of reformers, partially because of the opposition of the county executive officer. Then, in the 1970 Board of Supervisors' election, two challengers for office publicly supported consolidation, one of them vigorously. Also, the 1970 statewide ballot contained a proposition by the Constitutional Revision Commission that called for the elimination of the numerous election requirements for local government reorganization. The supervisorial challengers were elected and the state proposition passed. Also, about this same time, the chief executive officer for the County was dismissed.

The supportive supervisors soon joined the President of the Chamber of Commerce as co-instigators for consolidation. They scheduled a joint meeting of the Board of Supervisors and the City Council for March, 1971, to consider the subject of consolidation. After some initial opposition from members of the City Council, a five-member steering committee was formed, to be composed of two members from each body and one public member.

The public member was expected to be a long-time LAFCO member, who was a respected local attorney and an expert in local government reform, with ties to both the city and county. However, the four elective members were unable to agree on this individual and, when two other highly desirable potential members were mentioned, the elective members decided to expand the committee to eleven to give it greater representation of interest. The membership definitely leaned towards consolidation.

The two Supervisors on the committee assumed the initiative and the two City Councilmen lapsed into passivity. The chairman, who was the President of the Chamber of Commerce and also a vigorous administrator, allowed few digressions in the meetings of the steering committee. His views reflected and paralleled the desires of the instigator-Supervisors.

The steering committee was formally divided into subcommittees. The county's chief executive officer, the new city manager, the assistant city manager for community development, the principal administrative analyst of the county executive's office, and the LAFCO executive officer were selected as advisory members. The city and county each provided part-time staff to aid the committee.

The committee held numerous informal conversations during May 1971, in which the city council members continued to participate but little. However, the report which was written and researched mainly by the senior administrative analyst for the county executive officer, was signed by all eleven members and sent to the Board of Supervisors and the City Council in June.

The report concluded that, after fourteen years of discussion of city-county consolidation, the time had come for the community to make a decision. The committee agreed with all previous studies that suggested a single general-purpose government. The committee called for the establishment of a forty-member citizens committee to present a proposal to the Sacramento electorate. Further, the committee proposed that the city and the county provide seed money to assist this new citizens committee

and proposed that LAFCO and other regulatory bodies be instructed not to take any action during the study period which could hinder any recommendations that might come from this citizens committee.

The instigators, knowing that such steering committee recommendations can be killed by being accepted without comment, had included two identical proposed resolutions with the recommendations, one for the Board of Supervisors and one for the City Council. If passed, these resolutions would establish the new citizens committee and endorse the other recommendations. The instigators then began individual discussions with the other Supervisors and Councilmen, explaining that all they wanted was the chance to create a broadly based citizens committee to study this problem. In these discussions it was emphasized repeatedly that a vote for this resolution was not necessarily an endorsement of consolidation; rather, it was only an endorsement of the right of Sacramento citizens to vote on a proposed reorganized government. The Board of Supervisors passed the resolution by a vote of 4-1 in April, 1971.

The City Council first informally proposed a city-wide election (by a vote of 6-5) to poll the voters on whether they wanted consolidation. Because a vote on the question in the Fall of 1971 without time to educate the electorate would surely have been defeated, a hectic week of political maneuvering followed as the instigators worked to change the city councilmen's position. Finally, in late June, the council adopted the proposed resolution (by a vote of 7-3, with one abstention) offered by the steering committee.

By this time the instigator-Supervisors had decided that their political support on the Sacramento City Council needed upgrading. Sometimes publicly, and at other times behind the scenes, they began to assist the campaigns of four non-incumbent candidates for the City Council in the 1971 election. This was the first election in which Sacramento would elect its City Council by districts rather than at-large. The major metropolitan newspaper endorsed all the candidates supported by the reform leaders. They were elected. Three incumbents were defeated, one incumbent chose not to run, and one incumbent did survive in his city-wide bid for Mayor. This created a council almost unanimously committed to consolidation.

Phase III:

The instigators' task was to select the forty-member broadly based citizens committee, eight members to be approved by the City Council, twelve by the Board of Supervisors, and the other twenty by a three-man committee made up of the Mayor, the instigator-Supervisor as Chairman of the Board of Supervisors, and the citizens committee chairman. Although it was decided not to have only pro-consolidation members on this task force, it was also decided to appoint a supportive chairman and vice-chairman who were respected community leaders. The chairman selected was a long-time resident of Sacramento, a successful businessman and attorney. He was also chairman of the 1969 LAFCO Advisory Commission during which time he had shown superior leadership capability and support, although not overbearing, for consolidation. The vice-chairman selected was identified with the City

of Sacramento and also had a reputation for sound and independent judgment. The other members of the Committee represented a geographical cross section of the community, including business and labor, Republicans and Democrats, city dwellers, suburbanites and farmers, minorities and members of special district boards. The Committee also included a large number of politically astute state government political aides who had previously been involved in the Metropolitan Citizens for Better Government.¹

A staff was formed. It was originally funded by the City and by the County, and later received supplemental money from federal funding (grants from the Department of Housing and Urban Development and the Department of Labor). The administrative assistant to the instigator-Supervisor was appointed executive director of the committee. No Supervisors were to serve on the committee. Two former City Councilmen began terms on the committee, but then resigned. Most original members were Democrats, although the number of Republicans is increasing. On the whole, it was and is considered to be a broadly based committee.

Policies And Work Plan

The first task of the Citizens Committee was to decide upon the policies which would guide its preparation of the proposed charter amendment. Specific tasks were categorized and a detailed work plan and schedule was announced indicating that the charter proposal could be presented to the voters by November, 1974. An early and important policy decided upon by the Committee

¹ This organization had supported changing city council elections to district elections.

was that all action would be taken in public and that efforts would be made to disseminate as much information about the committee's activities as possible. It became apparent to the instigators, now including the chairman and the vice-chairman of the citizens committee, that the initial effort must represent a cohesive group effort on the part of the citizens committee. Because the committee numbered forty members, this effort consumed more time and energy than originally expected. It was a necessary effort, required, however, because this work educated the committee members and provided the instigators with evaluations of the expected contribution of each individual committee member. It also allowed staff the time to compile the voluminous documentation of the services performed by the various jurisdictions throughout the county and to become familiar with city-county consolidations nationally.

Sub-Committees:

The Citizens Committee divided itself into the following sub-committees in April 1972: Budget and Staff Facilities; Legal; Political-Public Attitudes; Programs-Procedures; Public Involvement; Structural Alternatives and Urban Services.

The following time-table was then established for the Committee and its sub-committees:

January-April 1972:	Organization.
March-December 1972:	Enactment of enabling legislation; collection and sorting of data; conducting public poll.
January-July 1973:	Construction of models for alternative political structures and completion of analysis of urban services that are now offered or will be offered.

July 1973-July 1974: Completion of final charter
and public presentations.
August-November 1974: Conduct election campaign.

Progress Report:

A report was published by the citizens committee in March, 1973, indicating that it had compiled considerable data, conducted a public opinion survey, analyzed alternative forms of government structures and discussed proposed elements of the charter with numerous city and county officials and citizens groups. A public opinion survey indicated an awareness of the consolidation effort and showed that the citizens' response was favorable.²

The Committee's report and recommendations were purposefully tentative and broad. They were deliberately not specific enough to ignite local opposition. By this time, the Committee had tentatively agreed upon an innovative approach: a two-tier government. The principal recommendation proposed a government that would be overall metropolitan government for the County, but from which certain functions and services would be excluded and given to local community governing boards.

Also, by this time, the only local opposition had come from three rural communities. The Citizens Committee responded

² 66% of the citizens favor some form of local government reorganization.
58% favor a joint city-county government.
64% support a single county-wide tax rate for basic services.
60% feel that an "ideal community government" should be, first of all, responsive
75% feel that it is appropriate that taxes collected in one part of the county be used to provide services in another part of the county less able to pay for them.

to this problem by modifying the concept of the charter proposal to exclude these communities from the metropolitan government.³

What the progress report did not say was that the Committee had spent a full year in general discussion which had allowed it to inspect its organization and weed out some less active participants. Furthermore, this time had allowed the members a full year for building contacts and broadening their base of support through individual conversations with potentially influential citizens throughout the community. The Committee was now ready to enact legislation and draft a charter.

Freeholders Committee:

In 1973, the Citizens Committee decided that it was also important to legitimize itself officially before it actually began to draft a charter amendment for the November, 1974 ballot. This required action by the California Legislature.

The instigators and the nucleus from the Citizens Committee began discussing this need with each of the Sacramento County legislators. They explained that the legislation was needed to give the Sacramento citizens a chance to decide on whether or not they wanted a new form of government. However, the instigators and the nucleus also considered the legitimization of the Citizens Committee by state statute most important in helping to improve the platform from which the charter proposal would be launched.

Enabling legislation was co-authored by the complete Sacramento delegation and introduced in April, 1973. It must be

³ Later it was decided to allow each of these communities to vote separately on whether they wanted to be included in the metropolitan government.

passed by October 2, 1973 by a two-thirds vote. Some of the most important provisions are the following:

"In submitting any such charter, the charter commissioners may also submit separate propositions, whether alternative or conflicting, or one included within the other, at the same time to be voted on by the electors separately, and, as between those so related, if more than one receives a majority of the votes, the proposition receiving the largest number of votes shall control as to all matters in conflict".

"If a majority of the votes cast in the largest city, or in the rest of the area of the county (including the other cities) is against reorganization and charter adoption, proceedings for reorganization...shall not be initiated..."

"Upon the ballots used at the election within each of the other cities shall also be printed...' if the proposed charter of the city-county of Sacramento is adopted as the governing law of the city-county of Sacramento, shall the city _____ retain its existing legal powers as provided for in said charter?'"

"Upon reorganization, the cities are deemed dissolved and thus incorporated, and are merged together with the county into the city-county of Sacramento."

"Upon reorganization, every speical district within the county, except the municipal utility districts, mosquito abatement disctricts, reclamation districts, school districts, and port districts are deemed dissolved and their functions shall be assumed by the city-county government, except as may be otherwise provided..."

"The Charger may provide for sub-governments, different tax rates and other differences in taxation, services, costs of government, and levels of service, and type of government and representation and administration in different areas of the city-county."

Part of Senate Bill 90 (1972) (limitation of tax increases by local governments) shall not apply to the new government.

Expected Oppositions:

By Spring of 1973, the Citizens Committee and its staff found little opposition emerging with the exception of the three outlying communities. Some voters could conceivably become confused on the two separate votes (one vote for a single general-purpose government, and a separate vote to decide whether their

own city should be included in that government).⁴

The Citizens Committee does not expect serious opposition from the employees of Sacramento City and the County, nor from most senior elected or appointed officials. However, if the charter recommends an appointed sheriff, this could produce strong opposition from the incumbent sheriff. Consequently, some Citizens Committee members are proposing that this issue be one of the specific questions left open to the voters.

In anticipation of individual opposition, the instigators and nucleus spent much time speaking to small groups and vested interests to build support for the concept of consolidation before more specifics become available. The Citizens Committee has also prepared comprehensive data designed to meet opposition, if and when it arises.

Restructuring The Citizens Committee

In March, 1973, the Citizens Committee reorganized itself into thirteen task forces, a shakedown that divided the Committee into specific projects. Many of the groups are expected to come up with recommendations for certain portions of the proposed charter as follows:

Projects Administration
Urban Services, clean-up and deferred
Social Services

⁴ The staff of LAFCO, which recommended in 1967 the incorporation of the new city despite recommendations by several reform groups which said that additional cities would complicate any major restructuring, and which was overruled by its commission 4-1, sees the present consolidation move as an immense threat to its importance. It, therefore, opposes consolidation because the enabling legislation stipulates that the charter may circumvent LAFCO and, if the charter passes, LAFCO in Sacramento County will be reduced to insignificance.

Revenue-Expenditure study
Request for proposal of financial consultant
Legislative Body
Administrator or Executive
Administrative structure
Criminal justice
Public Finance
Metropolitan-Community powers
Comparison of alternative structures
Boundaries
Personnel

At the same time, the committee began its political campaign to sell the electorate on the advantages of consolidated government. Members of the Citizens Committee and the reform supervisors increased their frequency of speeches to groups such as fire-fighter local unions and service clubs. Members who have especially close contacts with the minorities in Sacramento, call on them. Other members spread the word throughout their own organizations. One program has been undertaken to see that well-informed Citizen Committee members speak personally and at length with each of five hundred identified opinion-shapers in the city and county.

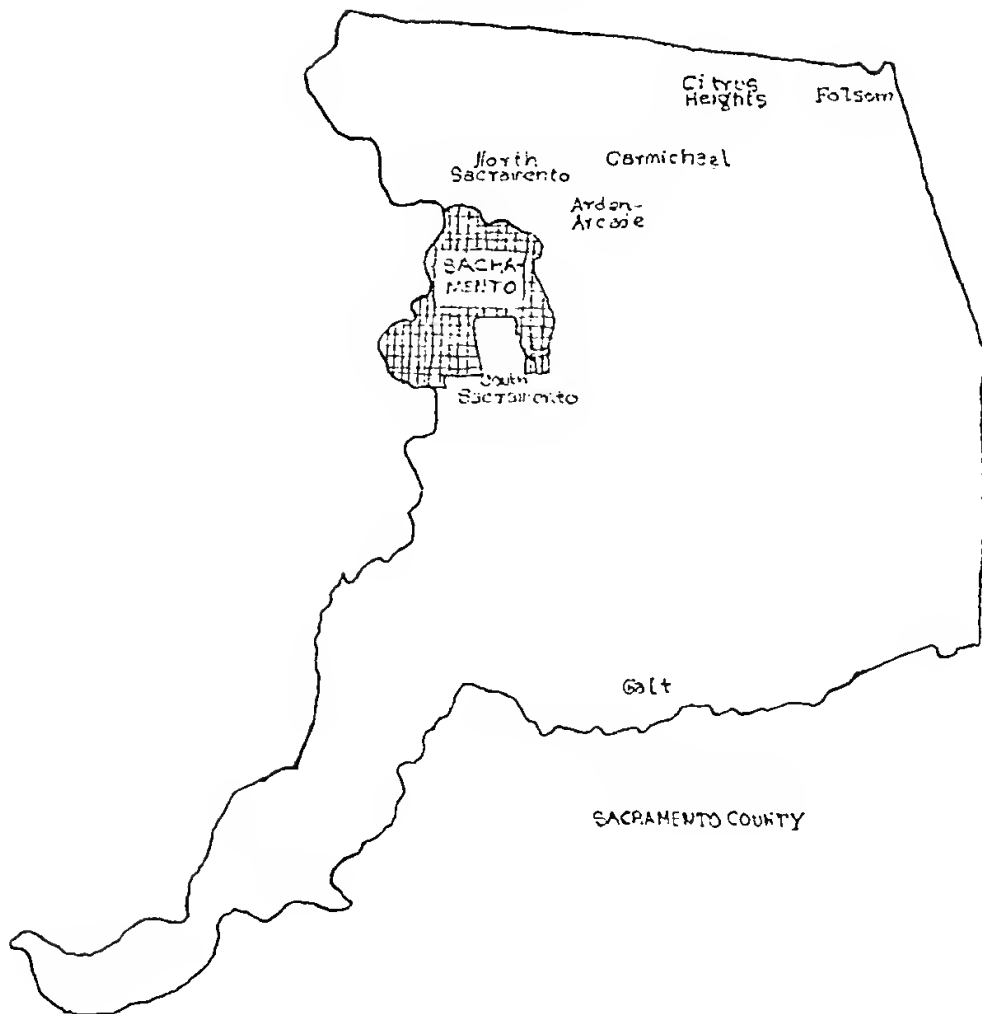
Political Sophistication

The instigators in this reform are highly political and sensitive to the requirement of a campaign to accomplish reform. This is partially because the State Capitol is located in Sacramento, and many of the Citizens Committee members are political employees, and also because past history has taught its lesson to the present instigators. They have already digested all of the literature on previous city-county consolidation attempts, and the chairman and the executive director have personally visited five communities throughout the country

which have recently consolidated city and county governments.

Whether the instigators correctly estimate the potential opposition, whether the charter amendment will be fashioned so that it will be politically acceptable, and whether the reformers will be able to respond quickly and decisively to tactics of the opposition, will not be known until November, 1974.

MAP 20



CHAPTER SIX

LOCAL GOVERNMENT REFORM IN CALIFORNIA - THE SURVEY TECHNIQUE

As stated in Chapter Two, the primary emphasis of this study of Local Government Reform in California was concentrated in three geographical areas, San Diego, Contra Costa and Sacramento. Our aim was to uncover the real story of successful instigators and to determine how they had successfully accomplished change in the form of limited modernization and restructuring at the local level. For this reason, detailed methods of action in the change process have occupied the bulk of the report.

A statewide survey was undertaken to determine, preliminarily, what kinds of modernization had recently occurred or were in motion throughout the state. The questionnaire was brief and aimed at getting successful officials to "share their secrets of success with us". The survey was not intended to be a statistical survey nor one from which a comparative analysis would result.

In the months of January and February, over 200 letters requesting a reply were mailed. The statewide Local Agency Formation Commission organization provided us with an updated mailing list. At least one member or executive officer of each of the state's LAFCOs was contacted. The Executive Committee and officers of each professional department within both the League of California Cities and the County Supervisor's Association of California received the survey material.

Considering that we were requesting written, personalized responses, the number of answers seemed fairly high. Over fifty questionnaires were returned and about twenty-five phone calls were received. The length of these answers varied from "no comment" to thoughtfully prepared, lengthy letters. The quality of content varied from well articulated strategy analyses with respect to overcoming barriers, to material which indicated that those responding did not understand the nature of the request. A check of the responses indicated that jurisdictions with at least 85% of the state's population responded in some manner, even if only telephone to report that little relevant activity was taking place. For these reasons, it is safe to assume that, for a brief time, we had a fairly accurate idea of the level of activity of local government-initiated modernization efforts throughout the state.

The conclusions are impressive. There is, frankly, a lot going on at this level. In the interests of currency, the results of the survey are not listed graphically. Old information should not be in print. What is important is that, contrary to images that are often conjured up in the halls of the State Capitol or on the banks of the Potomac, local government is a truly viable and changing entity.

At first glance, the change phenomena appear grossly complex and illogical. There is no restructuring that is precisely like another. This diversity and constant change is what makes local government, in California at least, as strong as it is. A climate of change is created locally with considerably less fanfare than is needed on a statewide basis. Generally

motivated by the issue of cost and efficiency, a local instigator accepts a challenge and works out a change plan that fits his own community. With a few minor exceptions, the changes themselves are different, with varying degrees of magnitude and the end products are unique. This reflects a heterogeneous mixture of local governments which, in turn, reflects an accommodation of local interests and needs and the underlying democratic process. This freedom and flexibility to change at the local level is the single, most protected feature of government in California. Home rule concepts provide natural governance for reform while, at the same time, they are conducive to change at the local level in response to citizen demands.

Survey Content

The following questions were asked in the survey:

1. What are the recent attempts or successes in reorganization, modernization, consolidation of departments, functional areas or jurisdictional responsibilities in your area?
2. Did you develop a strategy before or during the proposed changes? (Brief description.)
3. What campaign was necessary to try to make the change? (List the groups you looked to for support. How did you educate the public, if at all? Which steps were not worth the effort?)
4. What were the biggest barriers and what steps did you take to overcome them?
5. Has there been past or present interest in consolidating fire districts in your area? (Explain briefly.)

As stated, the cover letter requested that the official "share with us his secrets". There were several who specifically

asked that they not be quoted. Most of the telephone replies asked that they not be quoted.

There is apparently a lot occurring at the local government level. The following reports which we received from three counties and three cities attest to some of this activity. These reports are printed verbatim here.

COUNTY OF SANTA CRUZ

"Replying to your five questions respectively:

1. a. Consolidated nine Highway Lighting Districts, eight Street Light Maintenance Districts, the Highway Safety, Highway Lighting and School Crossing Guard programs into a single County Service Area.

b. Consolidation of a Sewer Maintenance District and Sanitation District into a single District.

c. Consolidation of three Sanitation Districts into a single District.

d. Consolidated, through annexation, the water services to 40,000 people into a single district.

e. Quadrupled the area of the Transit District.

f. Working now on reorganization of three Recreation Districts and a County Service Area into a single district.

g. Working now on a Master Fire Plan which hopefully will result in consolidation of at least several of the fifteen County Fire Districts.
2. Strategy? As the Chinese say: - Slowly, slowly, - catchee monkee!
3. Campaign: None. Time is on our side. We are using a Reorganization Committee and a County-wide Fire Plan Committee, but nothing more than occasional letter writing, arm-twisting and hot-footing.
4. Barrier: Apathy, and a cherished "Historical Community Identity."

5. No interest, but LAFCO keeps quietly forcing the issue. Eventually we will achieve some consolidation, but experience tells us it probably will be 'too little and too late.'"

COUNTY OF SONOMA

"The answers to the five questions for Sonoma County are as follows:

1. In recent years a number of functional consolidations or multi-agency programs have been developed although little success has been realized in consolidating county departments as such. Some of the changes that have occurred are as follows:
 - a. The County Library System merged with the City of Santa Rosa Library System and now provides services to six of the eight cities within Sonoma County as well as to the unincorporated areas.
 - b. Two separate Data Processing Centers were in operation in the past, each operating independently. The County Superintendent of Schools' Data Processing Center has now been eliminated and the County Data Processing Center, in addition to servicing county departments, provides services to all of the school districts in the county, to the City of Santa Rosa and has offered to provide services to the other cities.
 - c. The County Planning staff provides services to the six smaller cities in the county. In the past this was done without charge but has since been changed so that each of the cities reimburses the county for those services. With the county professional planning staff providing the services, greater county-wide coordination is achieved.
 - d. Road construction projects financed through the tax revenues produced by SB-325 are being developed on a county-wide basis with the county undertaking the engineering and awarding contracts for projects which are both inside and outside the cities. The city portion of the project is financed through the SB-325 allocations to that city, but the county is providing a coordinated program.
 - e. The County and the City of Santa Rosa have developed a joint sewer treatment system and there are plans for additional projects of a coordinated nature in the future.

- f. The County established a Central Warrant File System in which all of the law enforcement officers for the eight cities and county can get instant information regarding outstanding warrants at the time that the officer stops a vehicle or apprehends an individual. The county operates the entire system but the cities participate financially.
 - g. Over a period of years seven judicial districts have gradually been eliminated so that now a county-wide Municipal Court system exists with branch offices located in various areas of the county, but with the court activity conducted at the County seat in Santa Rosa.
2. The strategy differed from project to project, but in each case involved extensive discussions with the representatives of the various governmental agencies. Because of the nature of the changes, the involvement of the public was minimal.
 3. As indicated in the above question, most of the contact was through elected representatives or staff employees of the various governmental agencies involved. In each case developing specific and detailed information demonstrating the benefits of the program was valuable. The change that required the greatest amount of public involvement was the Municipal Court consolidations in which a number of meetings were held with Bar Association committees and citizen groups, as well as city representatives.
 4. In almost each case the biggest obstacle was the reluctance of an agency to give up something it had, such as an independent library or data processing center. The programs that began new without having to eliminate existing services were the easiest to accomplish, such as the Central Warrant File or the Planning services.
 5. Some years ago an effort to consolidate a number of fire districts was undertaken but was unsuccessful. There have not been any consolidation efforts recently."

COUNTY OF MENDOCINO

"In answer to your inquiry of March 12, 1973, I will answer the questions in the order that they are requested:

1. Mendocino County has had relatively little success in reorganization, etc., since we are general law county and many of these changes require state legislative action.

We find that when State legislative action is required, various vested interest groups are quick to respond to protect their particular interest. However, since 1965, the following changes have been effected:

- a. Consolidation of Clerk and County Recorder into one office.
 - b. Consolidation of Tax Collector and Treasurer into one office.
 - c. Creation of a unified Department of Public Works.
 - d. County assumption of all dog control operations
 - e. for the four cities in the county.
 - f. City-County joint study of all waste disposal under a Federal grant, under a joint powers agreement.
 - g. Joint powers agreement with Humboldt County for an Open Space and Conservation Element with the General Plan.
 - h. Development of a joint Lake County and Mendocino County Data Processing operation-the only one of its kind in the State. This joint venture is now being handled as a Data Processing District, with managing board from both counties.
 - i. A study of the ten county Justice Courts. After three studies, the Board has reduced the number from ten to nine. The Board has presently referred the entire matter of a Justice Court or a Municipal Court system to the electorate in April, 1973, for advisory vote.
 - j. LAFCO has initiated dissolution of various highway improvement districts and non-operational water water districts.
 - k. The Board has obtained legislative approval of a Bill authorizing them to appoint their own Clerk of the Board, rather than having the County Clerk as Ex-Officio Clerk of the Board.
2. & 3. Regarding your questions on strategies and campaigns: in effect, strategy is largely non-existent, but has relied on immediate problems and procedures, rather than on any long range plans.
4. The major barriers have been apathy, fear of any change, and various self-interest considerations. Also, many citizens feel that any reduction in the number of elected officials gives them diminished control. We have been unable to convince people that the present system, with elected administrators operating somewhat independently, creates less overall responsibility to the public for expected services and results. What is needed is a basic overhaul of county government to make it more efficient and more responsible to the public. One possible answer to this is a county-wide elected executive.

5. There has been discussion of consolidation of fire districts in Mendocino County, but no action has been taken to date.

CITY OF FULLERTON

1. "We created a Department of Development Services, consolidating the functions of building inspection and planning. We also established a Department of Public Works bringing together the activities of street maintenance, engineering, street tree-planting and maintenance, and traffic signing and engineering."

"We made two major changes in advisory commission activity. First of all, we created a Youth Commission to oversee all aspects of local government relating to youth affairs; and secondly, we consolidated the Board of Parking Place Commissioners and the Traffic Commission into a Traffic and Parking Commission".

2. "With respect to the Department of Development Services, we announced to the public generally the proposed consolidation and waited a time for public and City Hall feedback before acting. The new department head was an existing employee so that conversion problems were minimized. With respect to the Public Works Department, the change was accomplished at a time when there was attrition and retirement of personnel and little difficulties were encountered. I would describe the former strategy as one of adequate programming and time for feedback evaluation, and the latter as a strategy of timing."

"There was no particular strategy involved in forming the Youth Commission except to make sure that it was structured adequately to give full representation ethnically, geographically, etc., in terms of youth participants. The strategy involved with the consolidation of the Traffic and Parking Commission functions was merely to do it at a time when there were vacancies on the existing commissions in order to avoid upsetting people whose time had been so freely contributed in the past."

3. "With respect to all of our actions as referenced above, adequate publicity was given, and no action was taken immediately following the development of the format. We did not find it necessary to solicit support in the community. We calculated that the logic of these moves was sufficient to overcome any significant protest. The League of Women Voters in the case of departmental consolidation, and some of the existing commissioners in the case of commission organization, were effective in generating appropriate support. I cannot say that any of our steps were frustrating in terms of the effort."

4. "The biggest barriers to all of these things, of course, are people. We minimized people problems mainly by timing the change to reduce the possibility of irritation."

5. "I would assume that the reference to fire districts is not necessarily exclusive to the governmentally-created special districts for fire protection. We are not involved with any such special districts: there has been interest in consolidating fire protection efforts by various jurisdictions in the past several years with some measure of success. We have worked with the surrounding cities and the county in agreements for coverage in county islands and county territories remote to county fire stations. Fullerton has agreements with the county to give fire coverage in certain county areas on our perimeters for a stipulated fee. This fee was based on comparable county costs in providing said service. We have attempted to develop a central communications network for the several fire departments in northern Orange County but, as yet, have been unsuccessful in accomplishing this task."

CITY OF MONTCLAIR

"1. & 2. Attempting to enter into joint-powers agreement with County Board of Supervisors for City Planning Dept. to do entire planning, zoning, collection of fees, etc. for county in our planned 'Area of Influence' as determined by the Local Agency Formation Commission. Purpose to develop standards, decisions made by our Planning Commission and Council, hearings held by the city.

In order to get area residents to accept this concept and participation, we appointed two residents to serve on planning commission regarding matters affecting their area.

3. A few years back we entered into a joint-powers agreement among four cities and county, to form a West Valley Planning Agency which would serve also as Airport Land Use Commission, whose responsibility involves all forms of planning, land uses, transportation, etc.

4. Last August, after three years of negotiation, we were one of six agencies entering into a 50-year mutual agreement on developing a regional sewer program, capital improvements, reclamation and water management program working through the Chino Basin Municipal Water District. We felt this was better than establishing a totally separate sanitation district.

5. About four years ago our city succeeded in taking over jurisdictional responsibilities of county fire service district that served all of the City of Montclair plus the unincorporated area.

We made a joint powers service agreement with the County Board of Supervisors to continue to provide even higher level of service to unincorporated areas. We obtained public support

in the unincorporated area by guaranteeing to provide a sub-station and fire company service. This agreement or arrangement has worked out fine.

We are now in process of completing organization of a county-wide mini-cog called SANBAG (San Bernardino Assoc. Governments). All 14 cities and county have agreed and will be signing. Emphasis to be on regional problems within county as well as larger regional issues of planning through SCAG. Within the county, we will be attempting to eliminate overlapping of services where special districts may be duplicating municipal service, tax consolidation, areawide transportation, etc."

CITY OF ANAHEIM

1. What are the recent attempts or successes in reorganization, modernization, consolidation of departments, functional areas or jurisdictional responsibilities in your area?

- a. A coordination of Building and Planning Departments into a Development Services Department.
- b. Added Customer Services (primarily utility accounts) into the Utilities Department and placed Audit, Research and Budget, and Data Processing into the City Manager's office.
- c. Animal pound activities and licensing were transferred to the County of Orange.
- d. Santa Ana River and Santiago Creek Greenbelt Commission was established by the various governmental agencies directly interested in this area. They are the County of Orange, Orange Flood Control District, Orange County Water District and the Cities of Newport Beach, Huntington Beach, Costa Mesa, Fountain Valley, Santa Ana, Orange Anaheim, Yorba Linda, Villa Park and Garden Grove. This organization will coordinate the development of open space area within the two basins mentioned and will act as a "watch dog" for the preservation of a greenbelt.
- e. The establishment of an Intergovernmental Coordinating Council of Orange County has now been accomplished. The purpose is to consider those functions which are of concern, conflict or overlap among multiple jurisdictions.

2. Did you develop a strategy before or during the proposed changes? A brief description:

No strategy was developed for (a), (b), or (c). The strategy developed for the greenbelt organization consisted of a committee of 100 citizens in the affected areas, meeting to discuss methods of implementation of a greenbelt plan which had been prepared under contract with the County of Orange. This greenbelt plan received a considerable amount of publicity and resulted in many discussions within the County. The committee of 100 recommended the establishment of the greenbelt commission.

The Intergovernmental Coordinating Council was first brought up and discussed in Project 21, a county-wide discussion group sponsored by the University of California, Irvine and a multitude of governmental and private organizations of interest. An interim organization of mayors and county supervisors was formed to review and discuss some of the areas of concern. This group subsequently recognized the value and flexibility of the coordinating council and recommended its establishment.

3. What campaign was necessary to try to make the change? (List the groups you looked to for support. How did you educate the public if at all? Which steps were not worth the effort?)

No campaign was necessary in the first group (a, b, and c). I looked to the support of the affected department heads and the City Council. Education of the public was through our bi-monthly newsletter and through the regular news media reporting at the time the changes were made.

The greenbelt campaign is outlined in No. 2. Support groups were the governmental agencies listed above, the League of Women Voters and various organizations interested in ecology.

Education of the public was by continuous report through the news media.

The campaign for the Intergovernmental Coordinating Council is also outlined under No. 2. The support groups were all of the cities of Orange County together with the League of California Cities, Orange County Division, and the Board of Supervisors.

4. What were the biggest barriers and what steps did you take to overcome them?

In the first group (a, b, and c), the biggest barriers were individual personalities. To overcome these barriers, considerable discussion with the various people affected were held so that there was full understanding of the purpose and desired benefits of the changes, not only to the city but to the individuals themselves.

In (d) and (e) the biggest barrier was time. The step to overcome this was to keep continuous effort with the citizens committee meetings and meetings of government officials.

5. Has there been past or present interest in consolidating fire districts in your area? Explain briefly.

The interest in fire district consolidation is more in the direction of functional consolidation rather than consolidation of government structure. The fire fighting jurisdictions within the County are actively exploring joint communications, joint training facilities (possibly with police) and in providing first response on the basis of area rather than jurisdiction."

These reports are examples of the positive responses. Many of the negative responses asked not to be quoted.

The responses to questions 2, 3, and 4 are summarized in Chapter 1; but it is emphasized that the survey document alone was not sufficient to come up with the conclusions reached in that chapter.

The survey provided a cross-section of the kinds of modernization activity current in the state. Follow-up telephone calls and countless personal interviews were required to finalize our conclusions.

(The balance of the survey responses are on file in the Institute for Local Self Government, Berkeley, California.)

CHAPTER SEVEN

SUMMARY OF CONCLUSIONS

1. There must be a climate for change in order for the restructuring of local government to occur, whether this restructuring involves drastic reform, reorganization, modernization, or a minor administrative realignment. While the following does not represent an exclusive list, the factors mentioned here are those which most often create such a climate:
 - a. a Collapse of government's ability to provide needed services;
 - b. a Crisis of major magnitude;
 - c. a Catastrophe that has a physical effect on the community;
 - d. the Corruption of local officials and
 - e. the high Cost of government and the desire for a higher level of services.
2. Some change will occur, in one form or another, if any of the first four factors (Collapse, Crisis, Catastrophe or Corruption) are present, especially when they are of major dimension. It is up to governmental leaders who are directly affected to employ the available alternatives. However, information obtained during the research study does not indicate that any of these four factors are currently generating a climate for change in California.
3. Preoccupation with the Cost of government and desire for more efficient service delivery does exist in California at this time. These factors are a motivating force but,

by themselves, do not cause change to occur. It is necessary to organize and carry out a change Campaign capitalizing on the factors that provide a climate for change.

4. The campaign may vary in scale but regardless of the size of the effort, every campaign contains some very specific features.

The larger the scale of the restructuring attempt, the more important it is that all features are included. The features are: Planning and Contemplation, Education and Involvement, Community, Compromise, Concern, Cadence, Cooperation, Comprehension, and Concentration.

5. If an optimum combination of these features is absent, it will take longer to accomplish the change than originally anticipated by the change instigator.
6. Every successful reorganization has an instigator, who is the principal change agent, and a nucleus of workers who manage the change effort from the beginning stages through final implementation.
7. Unsuccessful reorganization efforts, while often characterized by many of the same features as a successful campaign, frequently lack the factor of a climate for change, and the campaign, if there is a semblance of one, is not well executed.
8. Local government reform is a Political Campaign.

Table # 1

Fire Protection Jurisdictions, 1956				
Fire Service Jurisdiction	WESTERN	CENTRAL	EASTERN	total
County Fire Districts	5	10	5	20
Autonomous Fire Districts	2	2	0	4
City Fire Departments	4	1	2	7
total	11	13	7	31

Table # 2

SELECTED FIRE TAX RATES 1960-1968								
	60-61	61-62	62-63	63-64	64-65	65-66	66-67	67-68
Central				.862	.869			
Mt. Diablo				.842	.874			
Consolidated						.820	.799	.750

Table # 3

SELECTED TAX RATES 1960-1969									
	60-61	61-62	62-63	63-64	64-65	65-66	66-67	67-68	68-69
Central FD				.862	.869				
Mt. Diablo FD				.842	.874				
Consolidated						.820	.799	.750	.730
Martinez									

Table # 4

Defining Characteristics of Contra Costa			
	REGIONS		
	Western	Central	Eastern
<u>Population:</u> 1970 census: 555,500	185,000	305,000	65,500
<u>Area:</u> square mile:800 acres: 513,088	156 99,940	255 163,406	389 249,742
<u>Demography:</u>	urban/ suburban	suburban	rural; some urban/suburb.
<u>Growth:</u>	moderate	rapid	rural:static urban:rapid
<u>Incorporated Cities:</u>	Richmond San Pablo El Cerrito Pinole Hercules	Concord Walnut Creek Pleasant Hill Clayton Martinez Lafayette	Pittsburg Antioch Brentwood
<u>Unincorporated Com- munities:</u>	El Sobrante Crockett Kensington	Orinda Moraga Danville San Ramon	Knightson Byron Marsh Creek Oakley

TABLE 5

CHRONOLOGY OF CONSOLIDATION EFFORTS, 1956-1973

FIRE JURISDICTION	DATE	DURATION	RESULT	MAP NO.
County-wide	1956	10 months	Failure	N.A.
10 central region districts	1959	3 months	Failure	1
County-wide	1961	2 months	Failure	N.A.
Mt. Diablo County Central County	1963-64	13 months	Success	6
Eastern County	1966	2 months	Failure	7
Mt. View County	1966	5 months	Success	8
Martinez City	1967-68	10 months	Success	9
Bay Point Auton.	1968	1 month	Success	10
Lafayette Auton.	1968	4 months	Success	11
Orinda County	1969	2 months	Failure	12
Danville Auton.	1969-70	2 months	Failure	13
Moraga County	1969-70	18 months	Failure	14
County Service	1970	1 month	Success	15
Brinones County	1971	2 months	Success	16
Pittsburg City	1971-72	6 months	Failure	17
Pittsburg City Antioch City	1970-71	7 months	Failure	N.A.
Pittsburg City Antioch City Industries	1972-73	Pending	Pending	18
Crockett County Carquinez County	1965	2 months	Success	19

TABLE 5 (cont.)

CHRONOLOGY OF CONSOLIDATION EFFORTS, 1956-1973

FIRE JURISDICTION	DATE	DURATION	RESULT	MAP NO.
Richmond City El Cerrito City Kensington Auton. San Pablo County El Sobrante County Pinole City Pinole County	1970-71	12 months	Failure	4+ 20
Richmond City El Cerrito City Kensington Auton.	1972-73	Pending	Pending	5
Pinole City Rodeo Auton. Hercules City	1972-73	Pending	Pending	5 16

TABLE 6

MT. DIABLO FPD CENTRAL FPD	1964	13 months	SUCCESSFUL
Fire Commissioners Fire Chief Firefighters City Councils Citizens	MT. DIABLO		CENTRAL
	4-1 opposed* Opposed* Mixed 2 support Not involved		Support Supports Support 1 supports Not involved
*Were neutralized during the campaign.			
EASTERN COUNTY FIRE DISTRICT	1965-66	6 months	UNSUCCESSFUL
Fire Commissioners Fire Chief Firefighters City Council (s) Citizens	CONSOLIDATED FIRE		EASTERN FIRE
	Support Supports Not involved Not involved Not involved		4/5 oppose Opposed Opposed Not involved Opposed
MT. VIEW COUNTY FIRE DISTRICT	1966	5 months	SUCCESSFUL
Fire Commissioners Fire Chief Firefighters City Council (s) Citizens	CONSOLIDATED		MT. VIEW
	Support Supports Not involved Not involved Not involved		Opposed Opposed Support N.A. Not involved
MARTINEZ CITY FIRE DEPARTMENT	1967-68	11 months	SUCCESSFUL
Fire Commissioners Fire Chief Firefighters Council (s) Citizens	CONSOLIDATED		MARTINEZ
	Support Supports Oppose 1 opposes Not involved		See Council Opposes Support Supports Support, 3-2

TABLE 6 (cont.)

BAY POINT AUTONOMOUS FIRE DISTRICT	1968	2 months	SUCCESSFUL
	CONSOLIDATED		BAY POINT
Fire Commissioners	Support		Support
Fire Chief	Supports		Opposes
Firefighters	Not involved		Support
City Council (s)	Not involved		N.A.
Citizens	Not involved		Not involved
LAFAYETTE AUTONOMOUS FIRE DISTRICT	1968	5 months	SUCCESSFUL
	CONSOLIDATED		LAFAYETTE
Fire Commissioners	Disinterested		Opposed
Fire Chief	Supports		Opposed
Firefighters	Support		Support
City Council (s)	1 opposes		Supports
Citizens	Not involved		Not involved
ORINDA COUNTY FIRE DISTRICT	1969	3 months	UNSUCCESSFUL
	CONSOLIDATED		ORINDA
Fire Commissioners	Opposed		Ambivalent
Fire Chief	Supports		Opposed
Firefighters	Not involved		Ambivalent
City Council (s)	Not involved		N.A.
Citizens	Not involved		A few opposed
DANVILLE AUTONOMOUS FIRE DISTRICT	1969	2 months	UNSUCCESSFUL
	CONSOLIDATED		DANVILLE
Fire Commissioners	Opposed		Tolerant
Fire Chief	Opposed		Not involved
Firefighters	Not involved		Not involved
City Council (s)	Not involved		N.A.
Citizens	Not involved		Not involved
MORAGA COUNTY FIRE DISTRICT	1969-70	18 months	UNSUCCESSFUL
	CONSOLIDATED		MORAGA
Fire Commissioners	Support		Support
Fire Chief	Supports		Supports
Firefighters	Support*		Opposed
City Council (s)	Not involved		N.A.
Citizens	Not involved		Opposed

*The firefighters Consolidated supported annexation after management offered a reduced

TABLE 6 (cont.)

BRIONES COUNTY FIRE DISTRICT	1971	4 months	SUCCESSFUL			
	CONSOLIDATED		BRIONONES			
Fire Commissioners Fire Chief Firefighters City Council (s) Citizens	Support Supports Not involved Not involved Not involved		Support Supports Support Not involved Not involved			
PITTSBURG CITY FIRE DEPARTMENT	1971-72	9 months	UNSUCCESSFUL			
	CONSOLIDATED		PITTSBURG			
Fire Commissioners Fire Chief Firefighters City Council (s) Citizens	Opposed, 3-2 Opposed Not involved Opposed Not involved		N.A. Opposed 65% Support Supports, 3-2 Support			
P-A-I CONSOLIDATION PROPOSAL	1972-73	PENDING				
	PITTSBURG	ANTIOCH	INDUSTRIES			
Fire Chief City Council Citizens	Supports Supports Support	Supports Opposed Opposed	Support N.A. Not yet involved			
Firefighters Influence Groups	Support Support	Support Not involved	Ambivalent Support			
CROCKETT-CARQUINEZ FD CONSOLIDATION	1965	6 weeks	SUCCESSFUL			
	CROCKETT		CARQUINEZ			
Fire Commissioners Fire Chief Firefighters Citizens City Council (s)	Supported Supported Supported Not involved N.A.		Opposed Ambivalent Ambivalent Not involved N.A.			
WESTERN CONTRA COSTA CONSOLIDATION	PROPOSAL		1971-72 UNSUCCESSFUL			
	RICHMOND	EL CERRITO	KENSINGTON	SAN PABLO	PINOLE	EL SOBRANTE
Fire Commissioners	N.A.	N.A.	For	Against	Against	Against
Fire Chief	Mixed	For	For	Against	Ambivalent	Ambiva.
Firefighters	For	For	For	Mixed	Mixed	Mixed
City Council (s)	For	Ambivalent	N.A.	Against	Against	N.A.
Citizens	Not involved	Not involved	Not involved	Not involved	Not involved	Not involved

TABLE 7
SUMMARY OF TAX RATES

	63-64	64-65	65-66	66-67	67-68	68-69	69-70	70-71	71-72	72-73
Central	.862	.869								
Mt. Diablo	.842	.874								
Consolidated	-	-	.820	.799	.750	.730	.725	.724	.724	.749
Eastern										
Mt. View										
Martinez										
Bay Point										
Lafayette										
Orinda										
Danville										
Moraga										
CSA5										
Briones										
Pittsburg										
Antioch										

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CHANGE PROCEDURES:

Step #1. How a change is initiated. There are two ways that change can begin. One, the citizens of the district can petition for the change. Generally, a petition requires the signature of 5% of the voters within the district.¹ The other way that change can be started is by resolution of the legislative body (usually the board of directors of the fire district or the city councilmen of a city). Resolution is, of course, the easier of the two methods because it requires approval by only a majority of the members.

Step #2. The Local Agency Formation Commission (LAFCO) is the county policy agency responsible for approving most changes that occur in the county. In general it requires:

- (a) Petition - Resolution
- (b) Certain maps and descriptions of the area involved.
- (c) The terms and conditions involved in the change.

LAFCO studies the plan and then approves or disapproves the proposal. If LAFCO disapproves the proposal, a similar proposal cannot be submitted for 1 year, unless LAFCO waives the limitation.

Step #3. Generally, the proposal must be approved in proceedings by the County Board of Supervisors or Board of Directors.

Notice is generally given of the Board of Supervisors meetings on the proposal. Public hearings are held where protest may be made and various arguments and evidence on the proposal presented.

Generally, the Board of Supervisors may make one of three decisions.

- (a) Disapprove the proposal
- (b) Approve the change - without an election
(there are certain restrictions on this option)
- (c) Approve the change - subject to a majority approval
by the voters of the district involved

Step #4. Election procedure. This is really a series of small separate steps. The main event is the election, where the voters either approve or disapprove the proposed change.

1

There are two types of districts. They are resident voter districts and landowner voter districts. However, as almost all fire districts are resident voter districts, this difference will not be emphasized.

Step #5. General terms and conditions. This positioning, as far as this paper is concerned, is out of step with the real world. These are the terms and conditions agreed to by the district or districts considering the change. Terms and conditions include such things as what will be done about personnel, bonds, taxes, property, etc. In reality these terms and conditions must be agreed to and submitted to LAFCO at the beginning of the change process. These are listed fifth in the flowcharts for ease of understanding.

These terms and conditions are really suggestions to the fire districts or areas that should be considered and agreed upon, before change transpires. If an agreement to an area is arrived at, that agreement is binding on that point. If a particular point is not covered then Step #6 must be considered.

Step #6. Specific terms and conditions. If agreement on a particular point is not reached or if a point is omitted, then the District Reorganization Act provides for a statutory answer.

While not absolutely necessary to understand the District Reorganization Act, the Knix-Nisbet Act (Local Agency Formation Commission - starting at Section 54774 of the California Government Code) is helpful toward understanding how the District Reorganization Act functions.

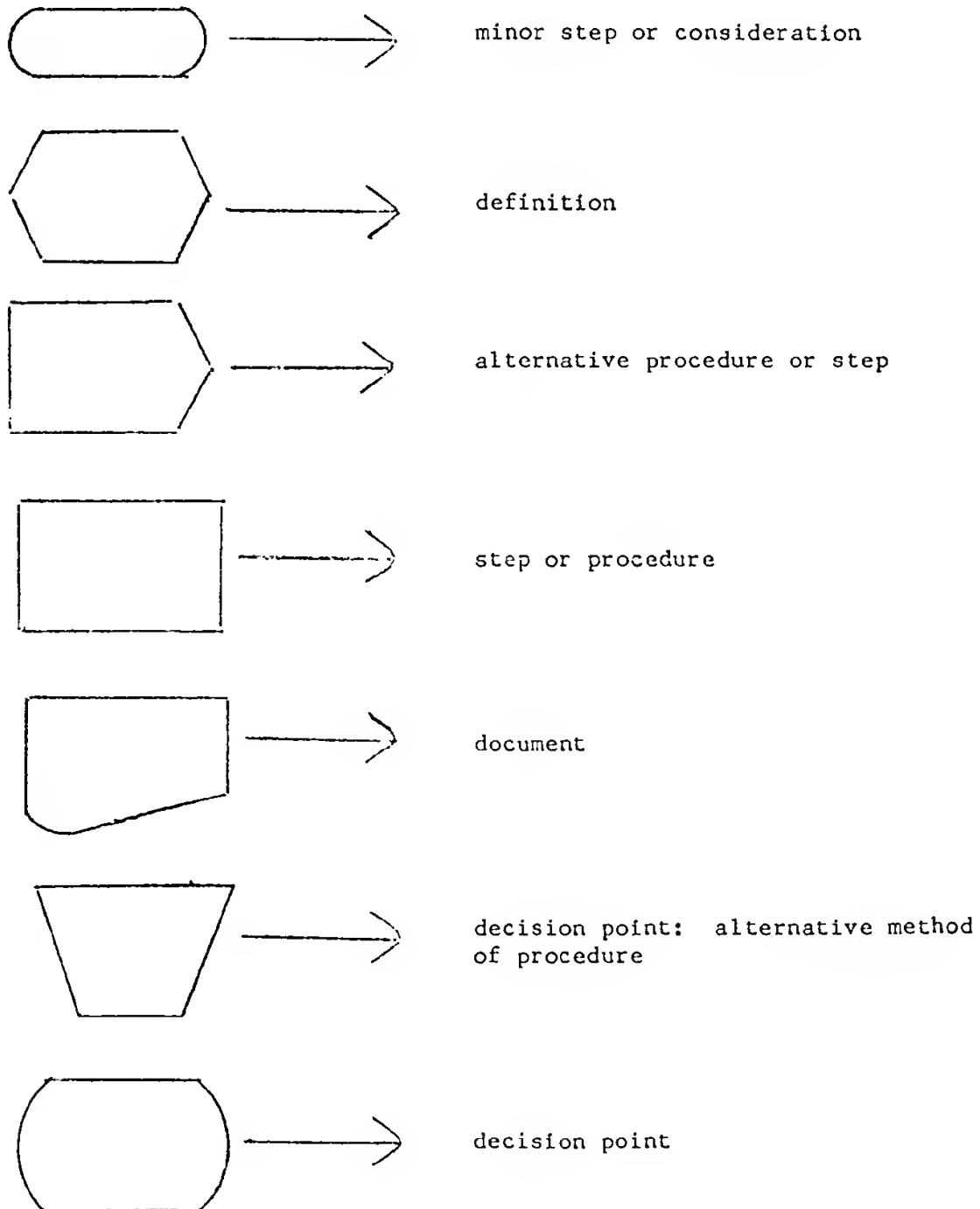
The Local Agency Formation Commission plays a vital role in restructuring local government. Most changes in special districts require LAFCO approval.

GENERAL DEFINITIONS

- Annexation: The inclusion, attachment or addition of territory to a district.
- Detachment: The exclusion, deletion or removal from a district of any portion of the territory of said district.
- Reorganization: One or more changes of organization proposed for each of two or more subject districts, including cities, landowner-voter districts or resident-voter districts, the formation thereof, all such changes of organization and formations being to a single plan of reorganization.
- Dissolution: The disincorporation, extinguishment and termination of the existence of a district and the cessation of all its corporate powers, except for the purpose of winding up the affairs of said district.
- Minor Boundary Change: The annexations or detachments, or both, an alteration or relocation of the boundary of a district resulting in not more than one acre of land being annexed to or detached from such district.
- Note: The relationship between annexations and detachments and minor boundary changes is explained in Section 56350 of the District Reorganization Act.
- Consolidation: The uniting or joining of two or more districts into a single new successor district, all such districts formed pursuant to the same principal act.
- Merger: The extinguishment, termination and cessation of the existence of a district of limited powers by the merger of such district with a city as a result of proceeding taken pursuant of this division.

FLOWCHART SYMBOLS

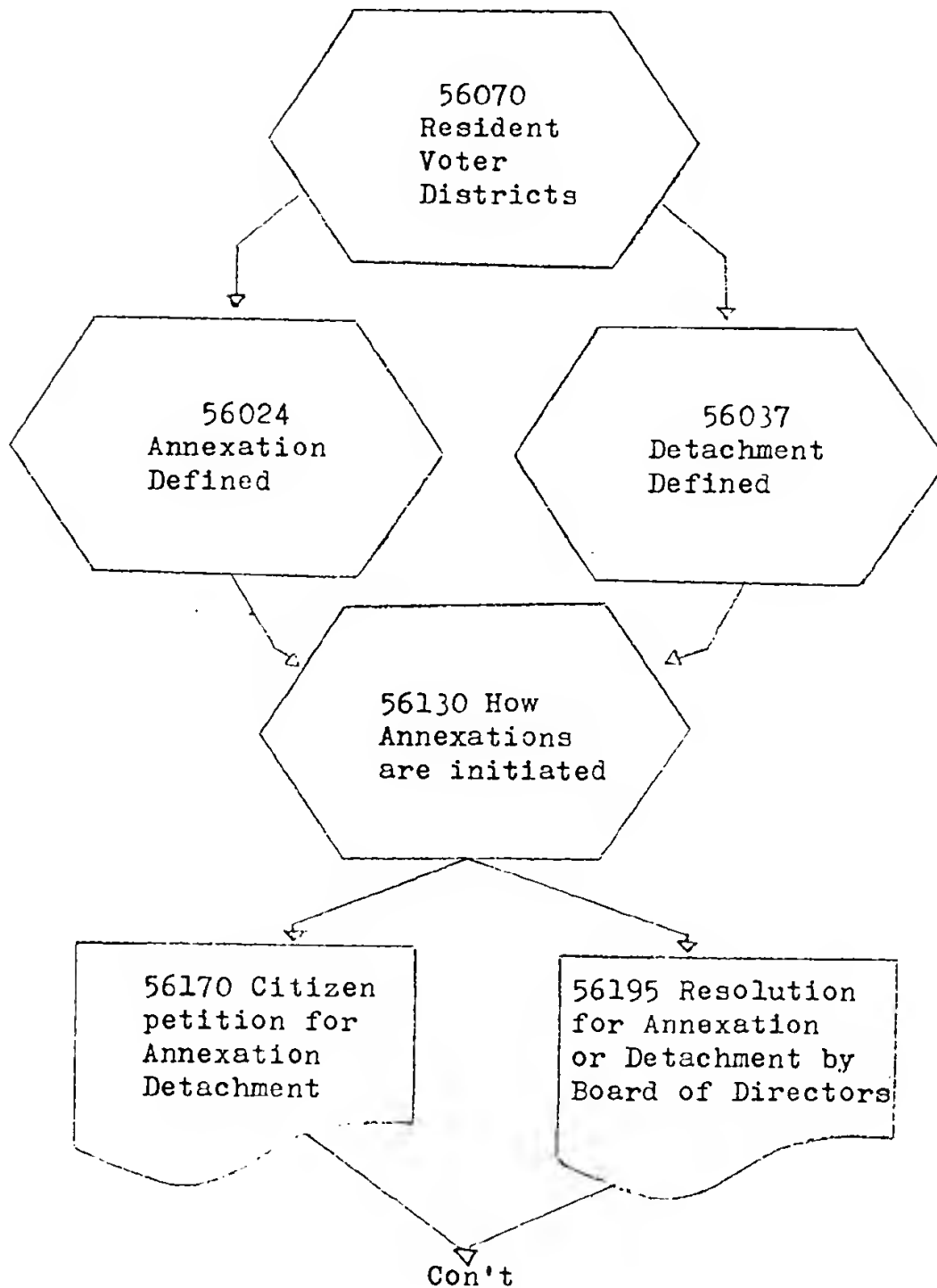
There are some variations from normal flowcharting practices in this appendix. This is mainly to allow sufficient space for notes and explanations of the action being taken:



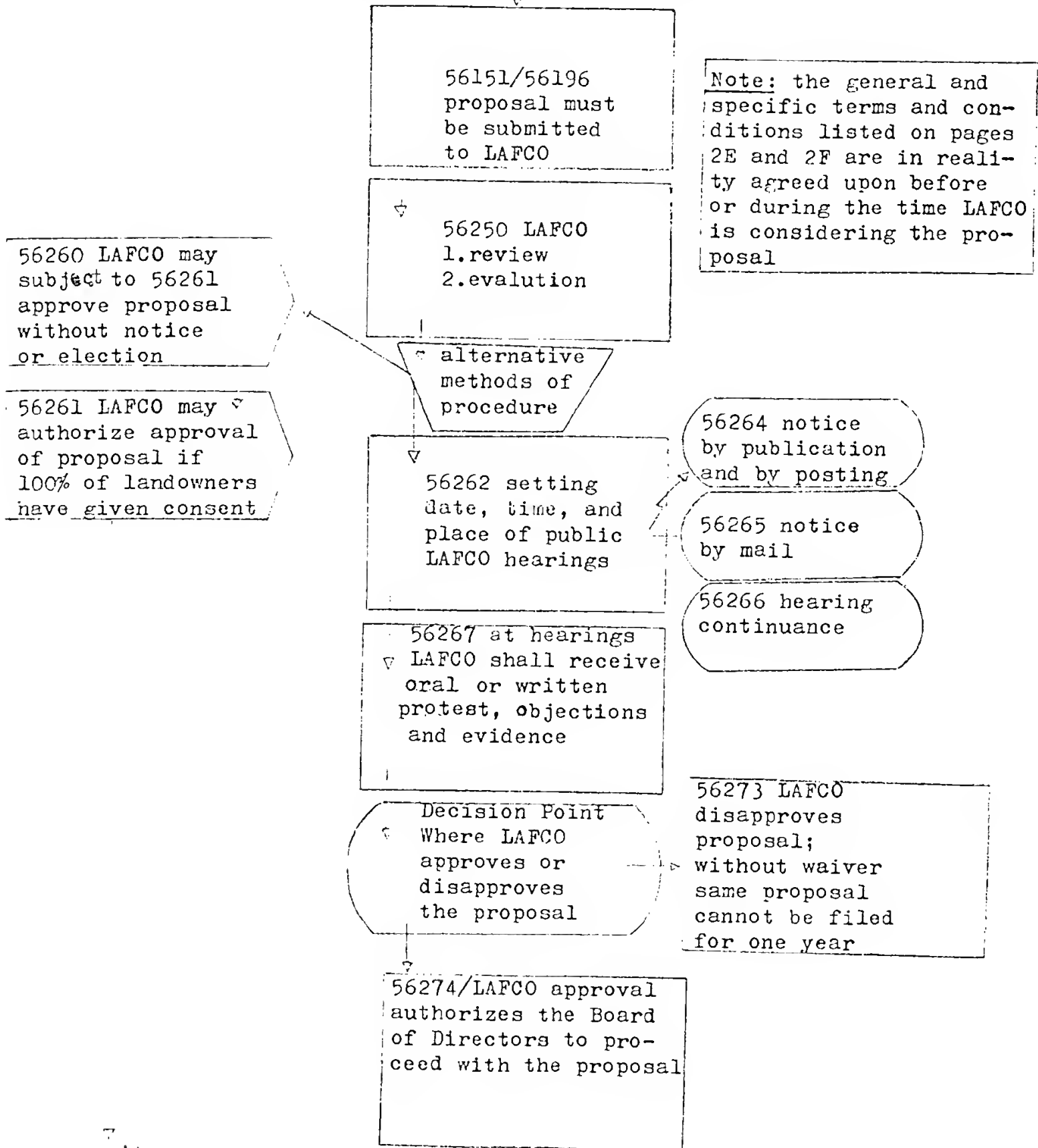
Unless otherwise noted all numbers within the flowchart symbols refer to District Reorganization Act of 1965 which can be found at Section 56000 of the California Government Code.

ANNEXATION AND DETACHMENTS

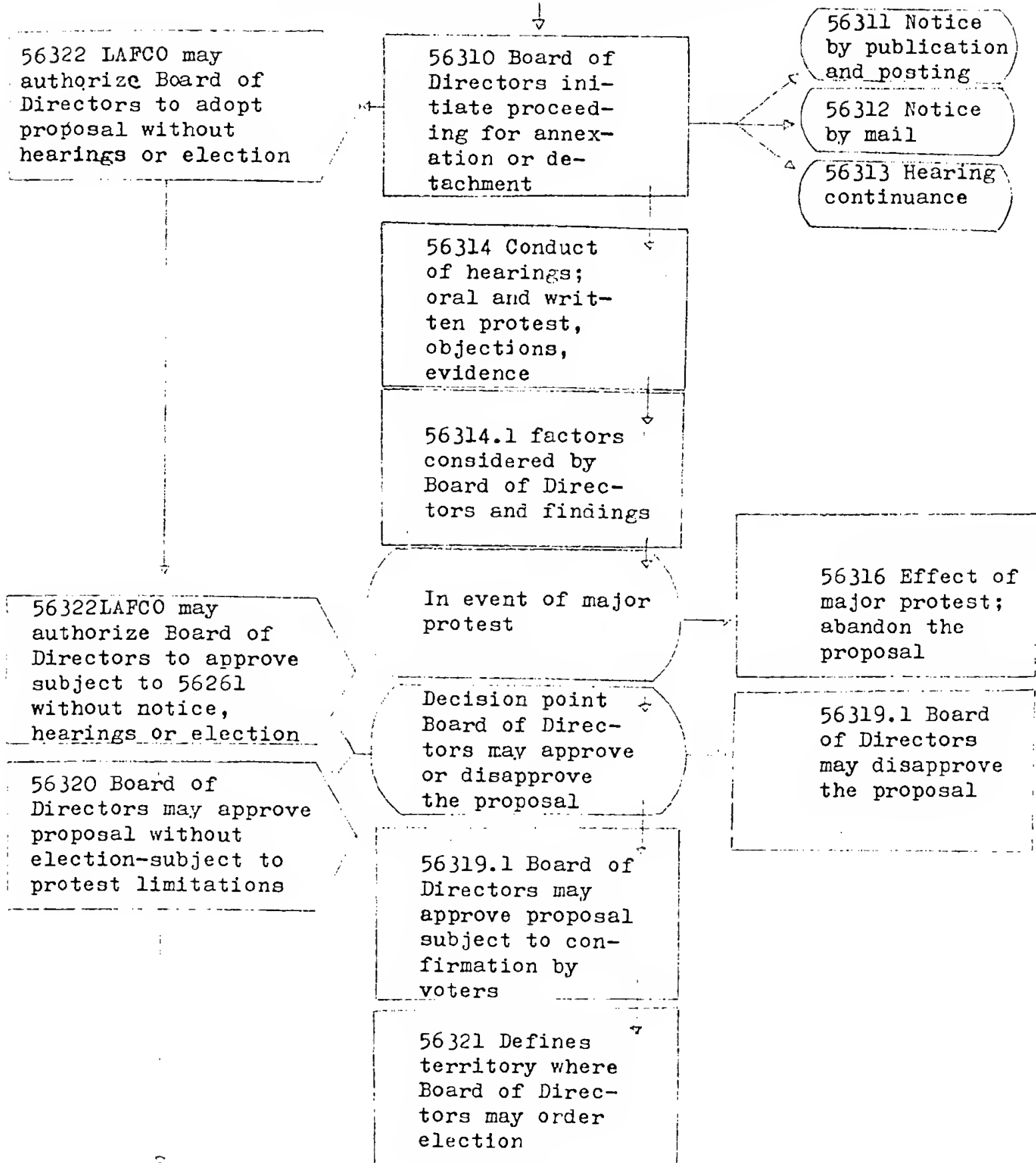
How change is initiated



ANNEXATION AND DETACHMENTS
Local Agency Formation Commission (LAFCO) Procedures



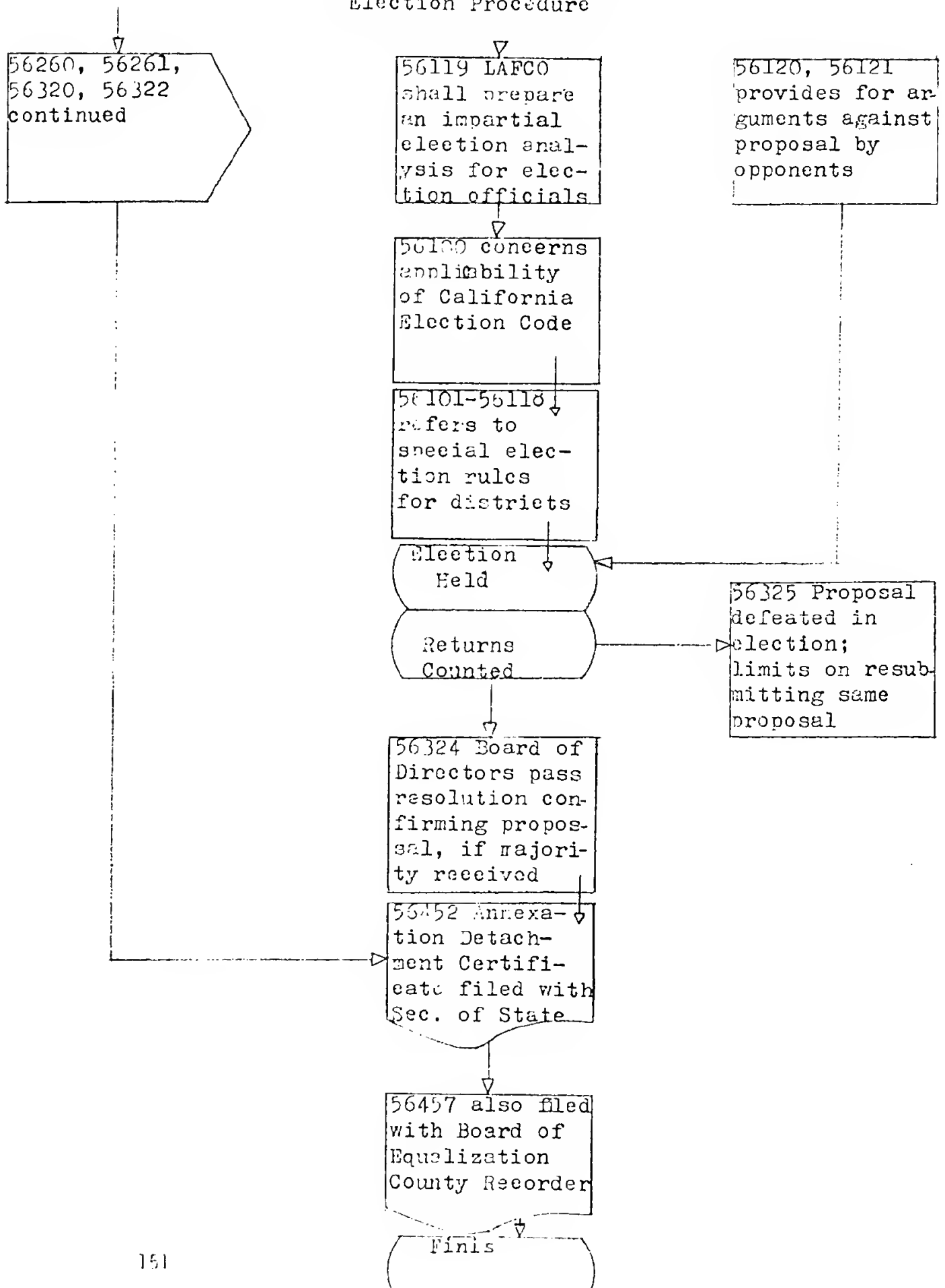
ANNEXATION AND DETACHMENT
Proceedings by the Board of Directors



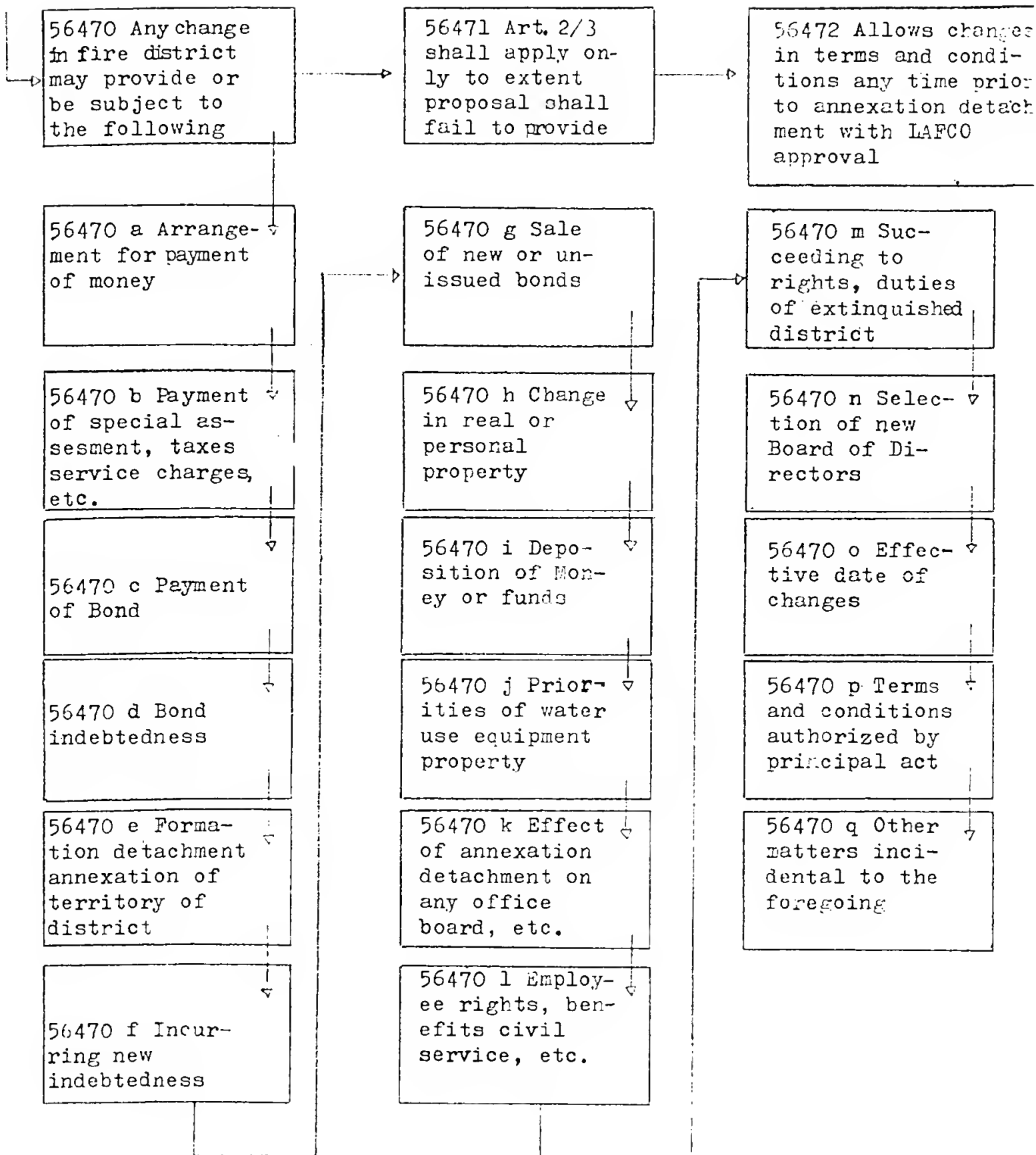
Con't

Con't

ANNEXATION AND DETACHMENT
Election Procedure



ANNEXATIONS AND DETACHMENTS
General Terms and Conditions



ANNEXATION AND DETACHMENT
Specific Terms and Conditions

Article 2 Annexation

56480
Jurisdiction
rights and
duties

56481 Free ▽
use of
district
property

56482 Liability
on new bonds;
assessment
and services

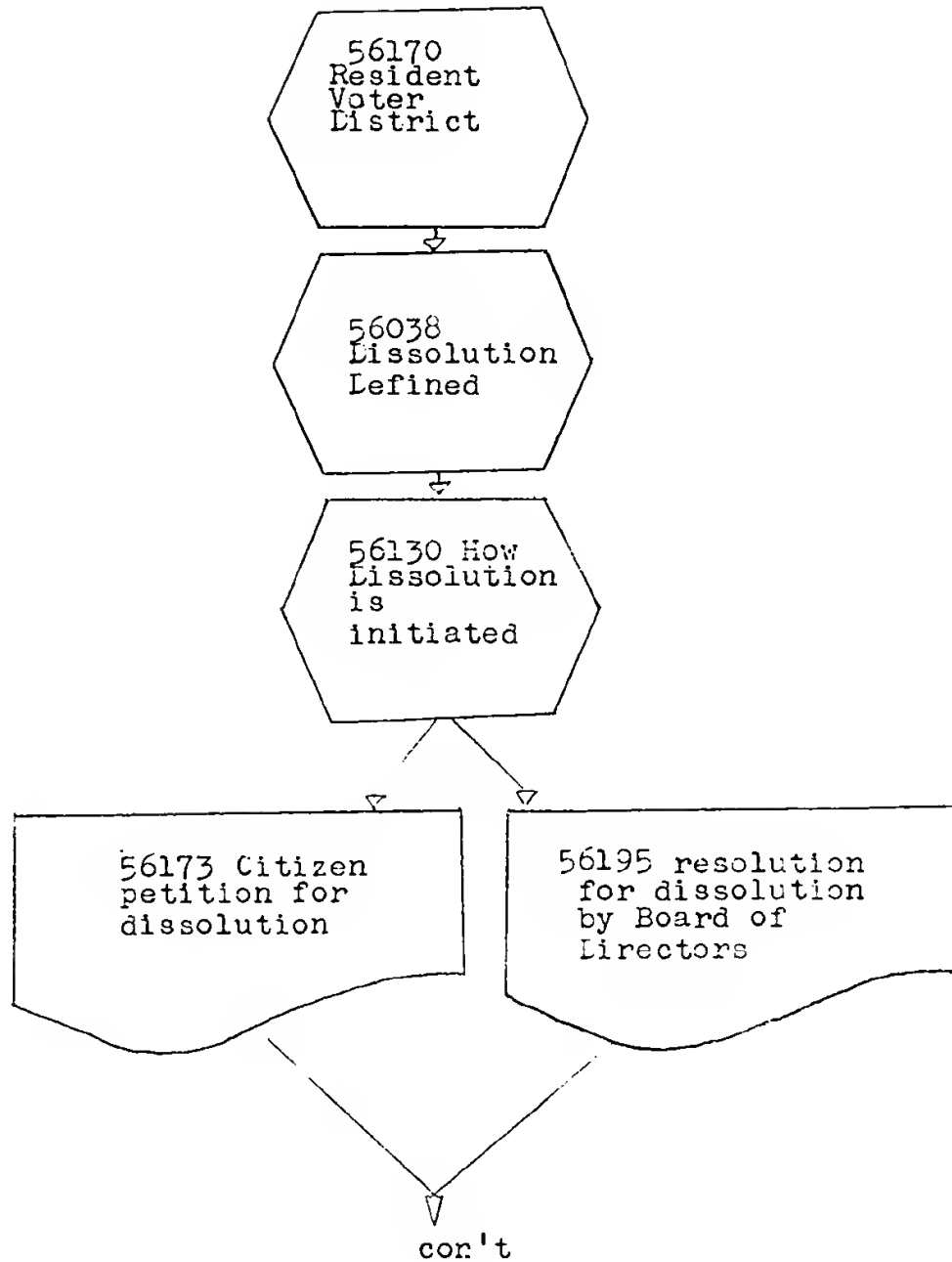
Article 3 Detachment

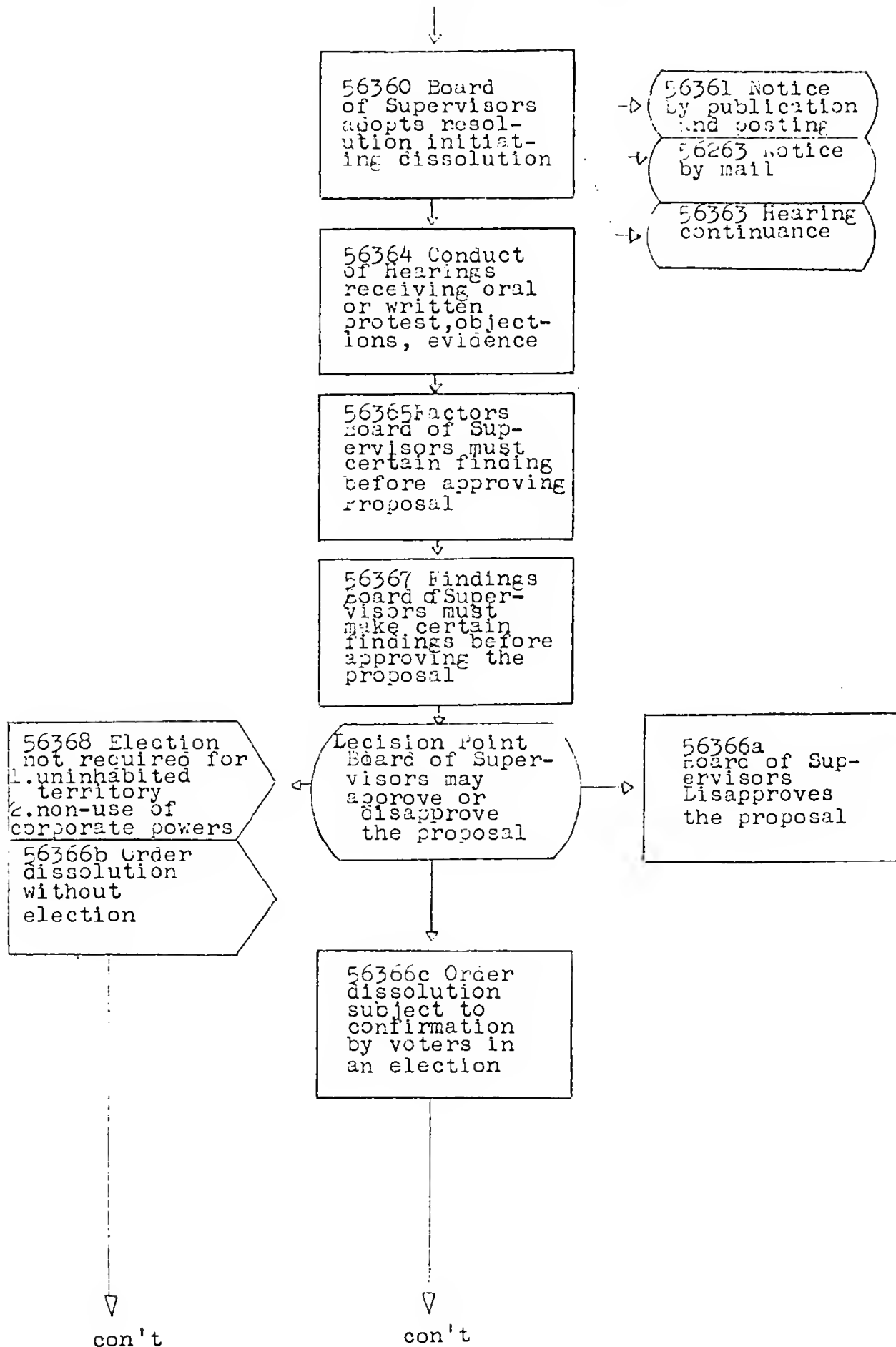
56490
Jurisdiction
rights and
duties

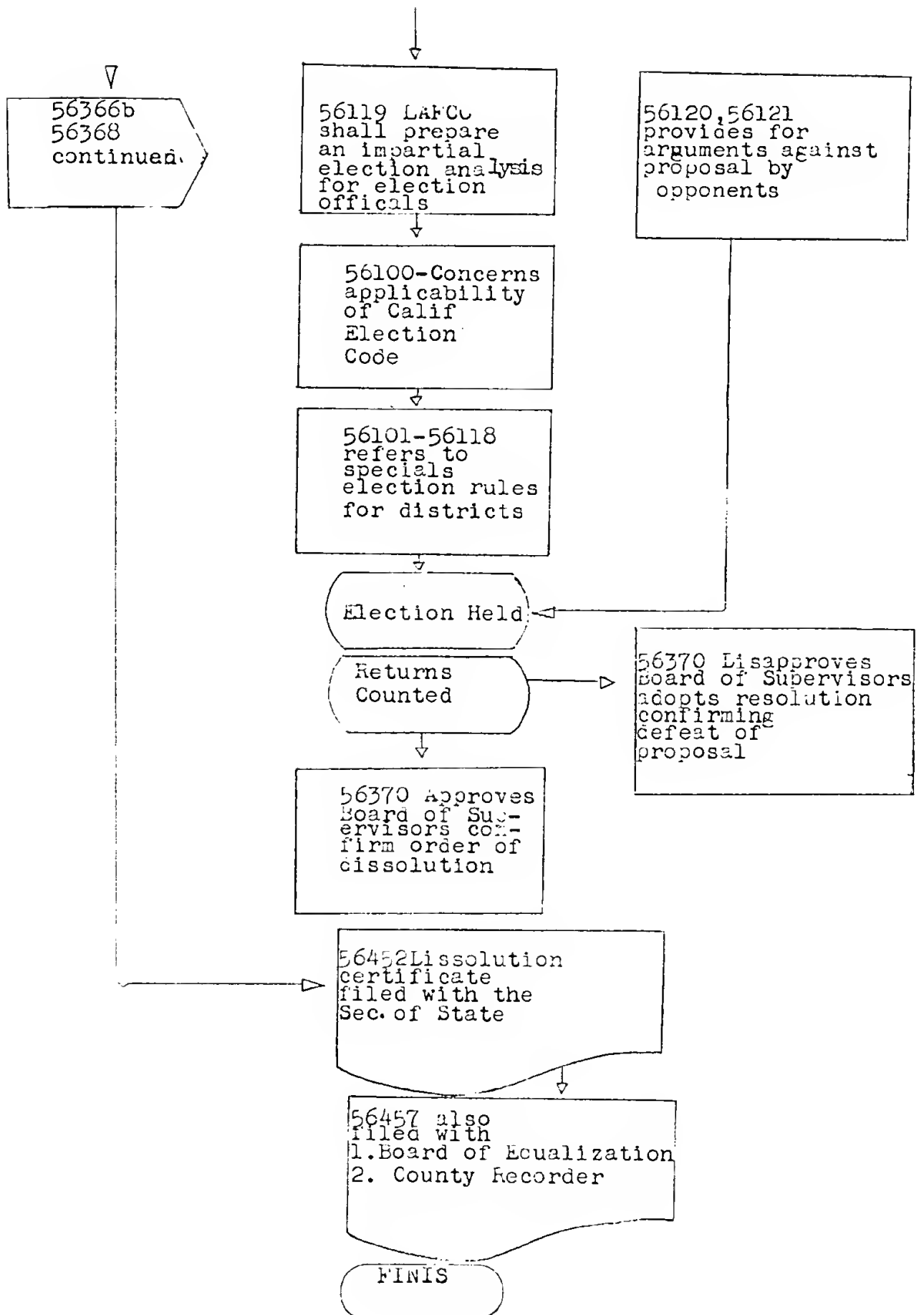
56491 Loss ▽
of rights
to funds

56492 ▽
Liability on
outstanding
bonds, etc.

How change is initiated







REGISTRATION
Local Agency Formation Commission (LAFCO) Procedure

56151, 56196
Proposal for
dissolution
must be sub-
mitted to
LAFCO

Note: the general and/or
specific terms and condi-
tions listed on pages 4E
and 4F are in the real
world agreed to before or
during the time LAFCO is
considering the proposal

56250-LAFCO
1. review
2. evaluation

56262-Setting
date, time and
place for
public LAFCO
hearings

56264 Notice
by publication
and by posting

56265 Notice
by mail

56266 Hearing
Continuance

56267 at hear-
ings LAFCO
shall receive
oral or written
protest, objec-
tions, evidence.

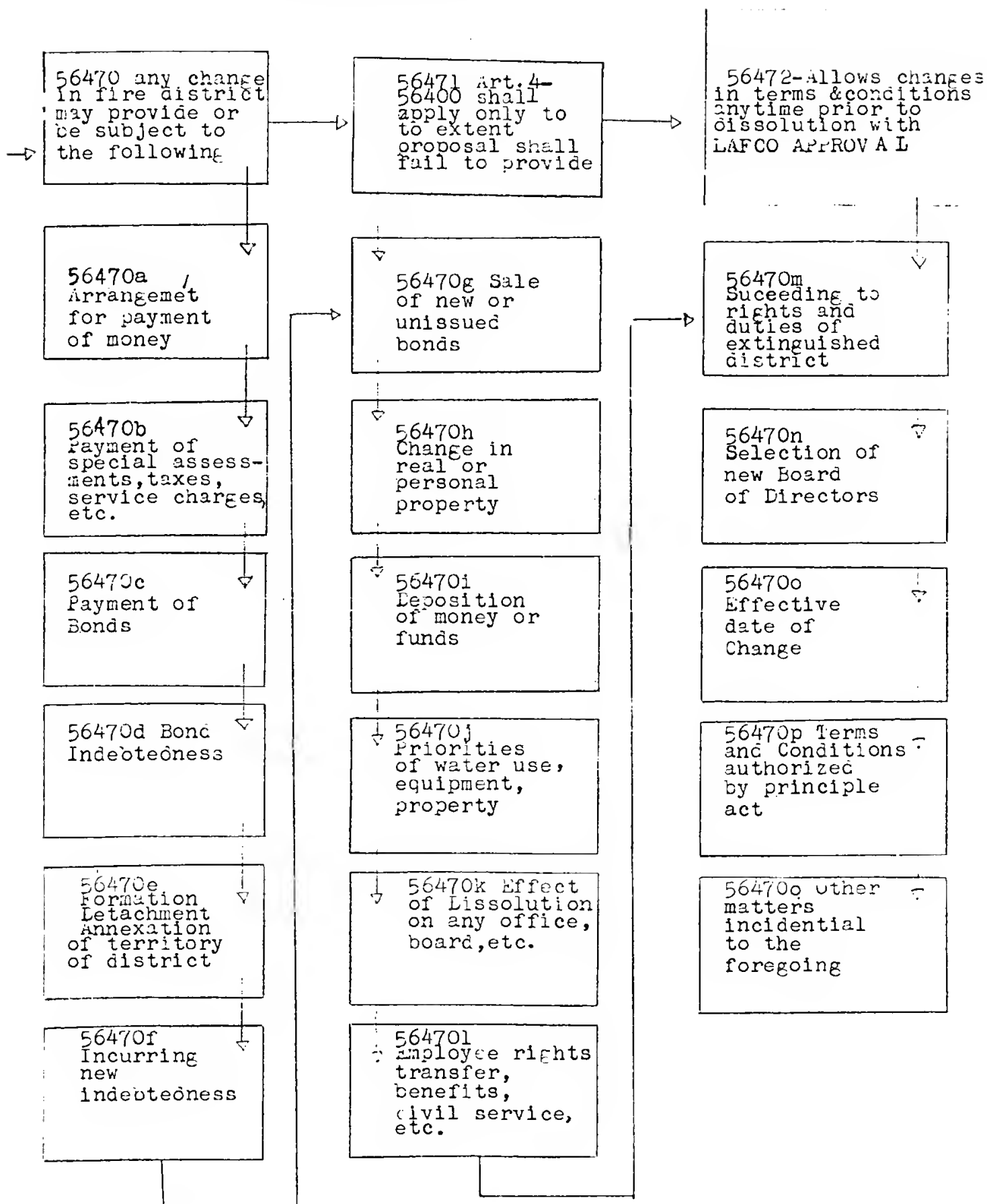
Decision point
where LAFCO
approves or
disapproves
the proposal

56273 LAFCO
disapproves
proposal; with-
out waiver
same proposal
can not be filed
for one year.

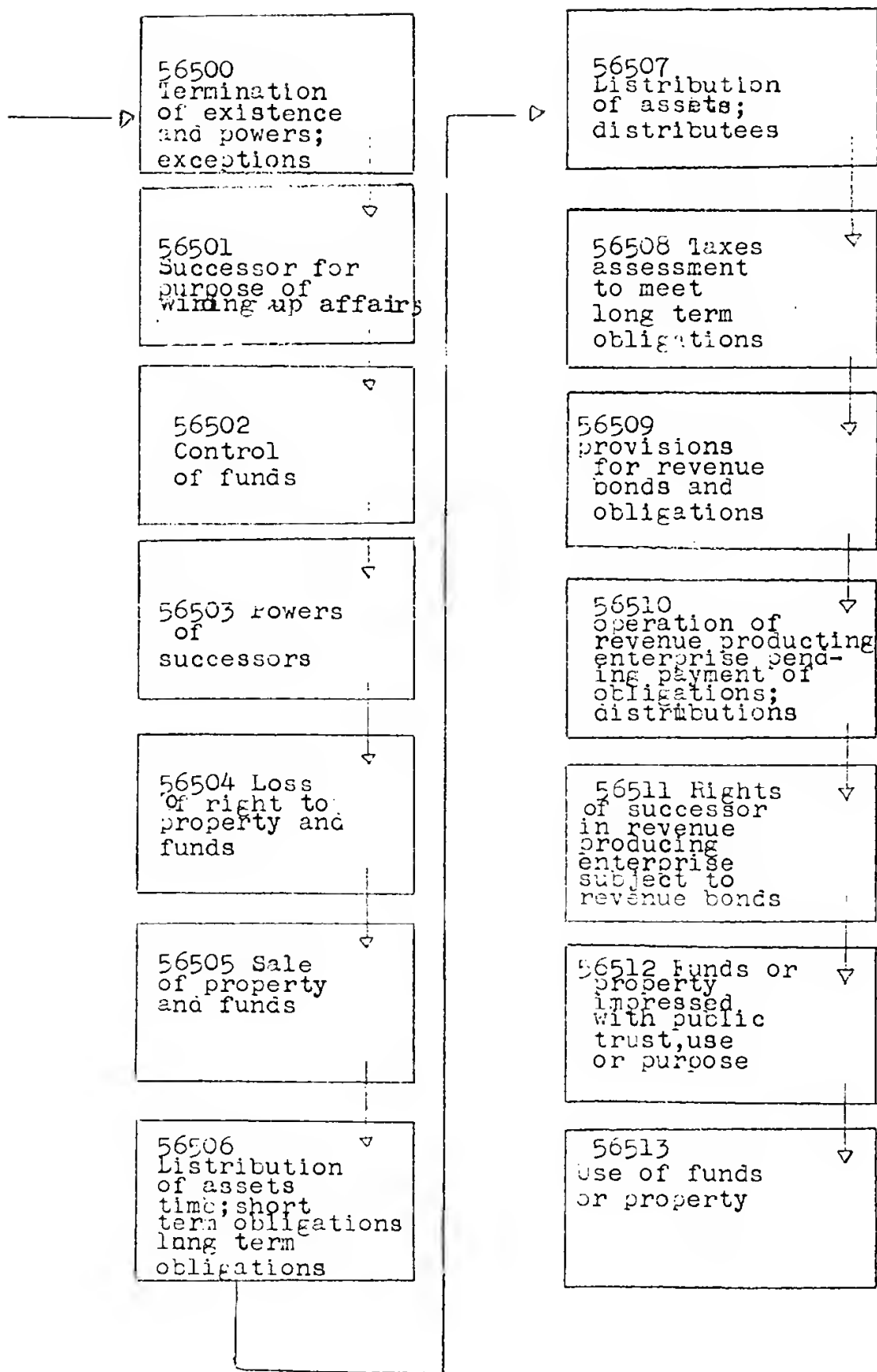
56274 Approval
by LAFCO means
the proposal
must be sub-
mitted to the
Board of Super-
visors.

con't

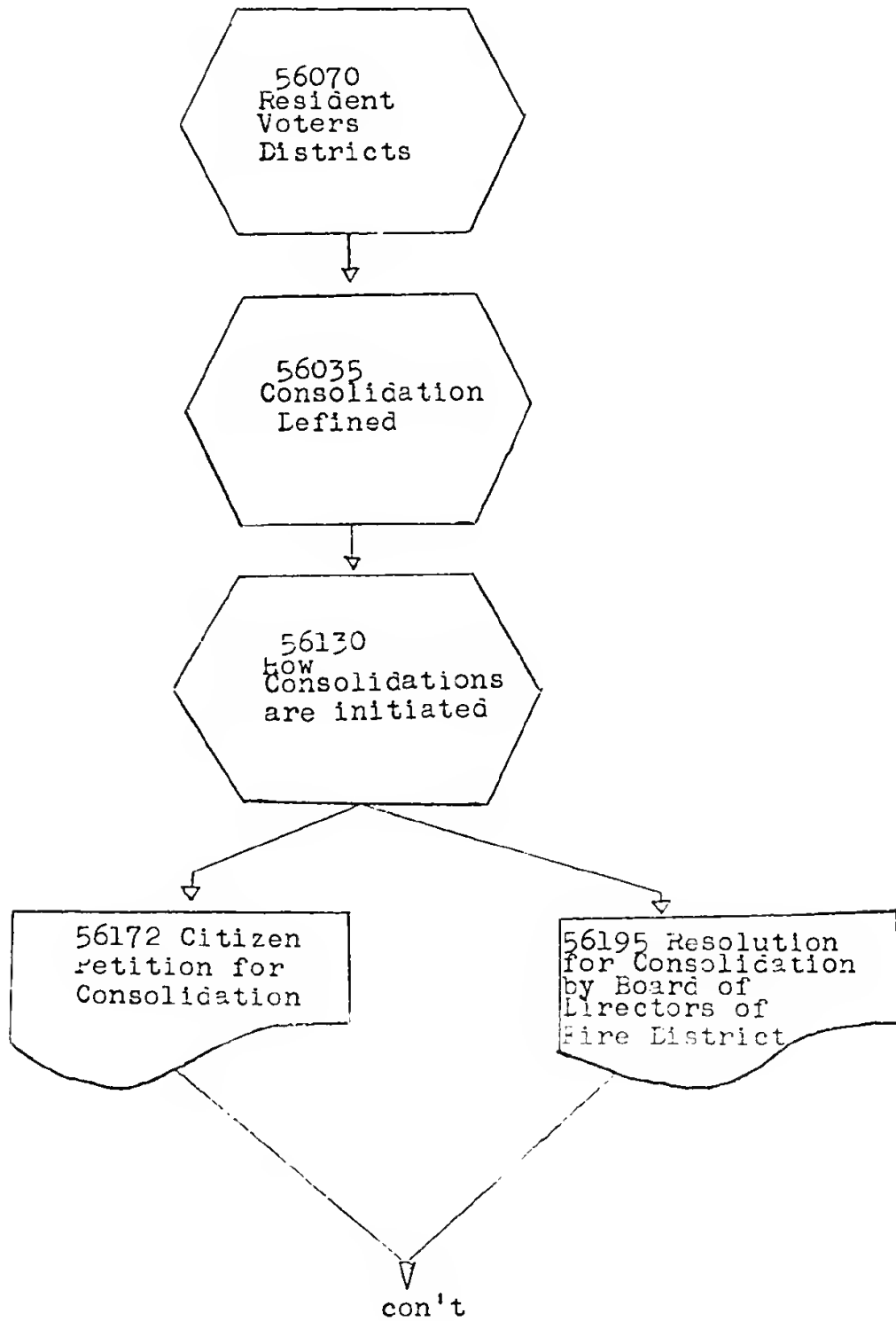
DISSOLUTION
General Terms and Conditions



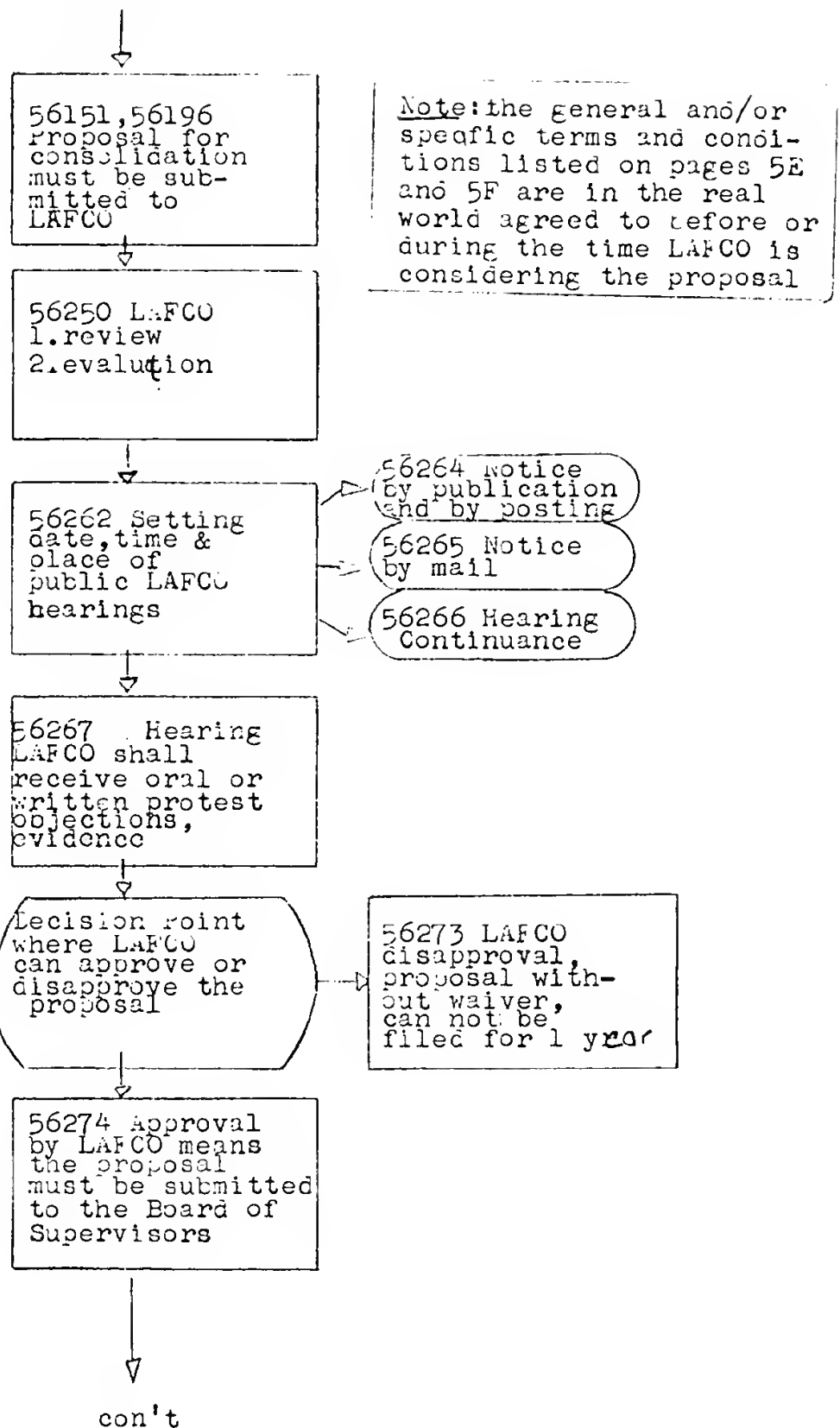
LISSOLUTION
Specific Terms and Conditions

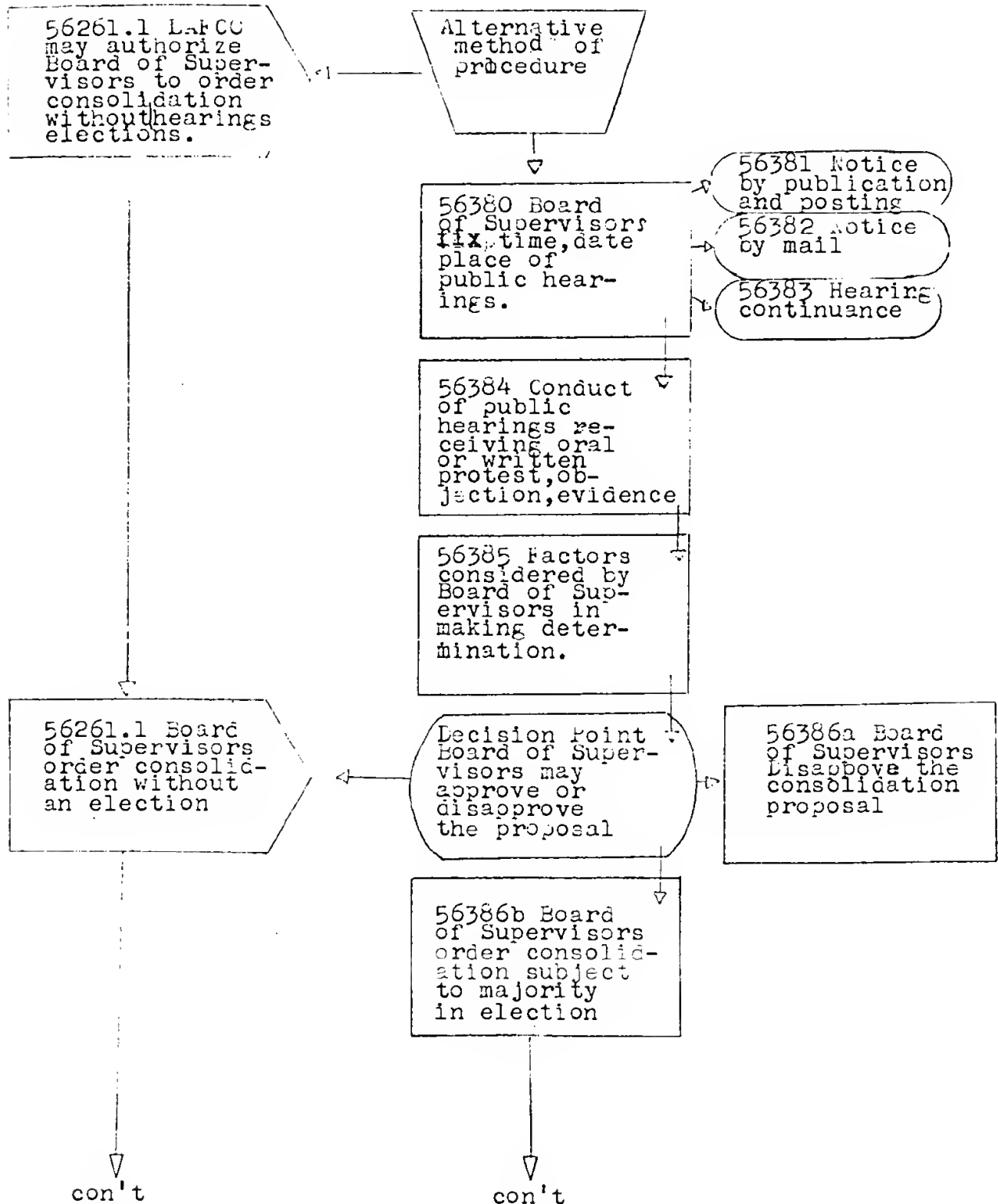


How change is initiated

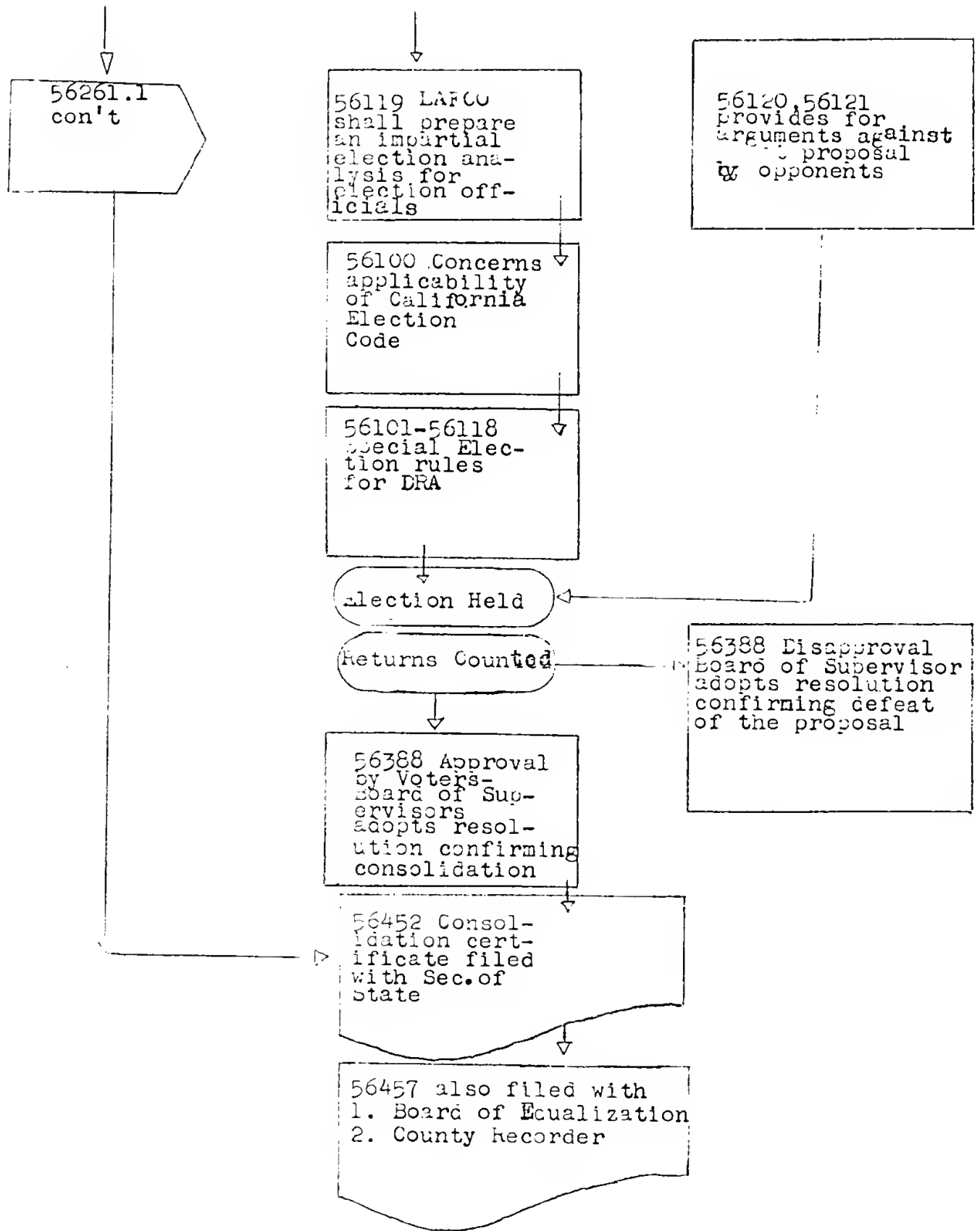


How change is initiated

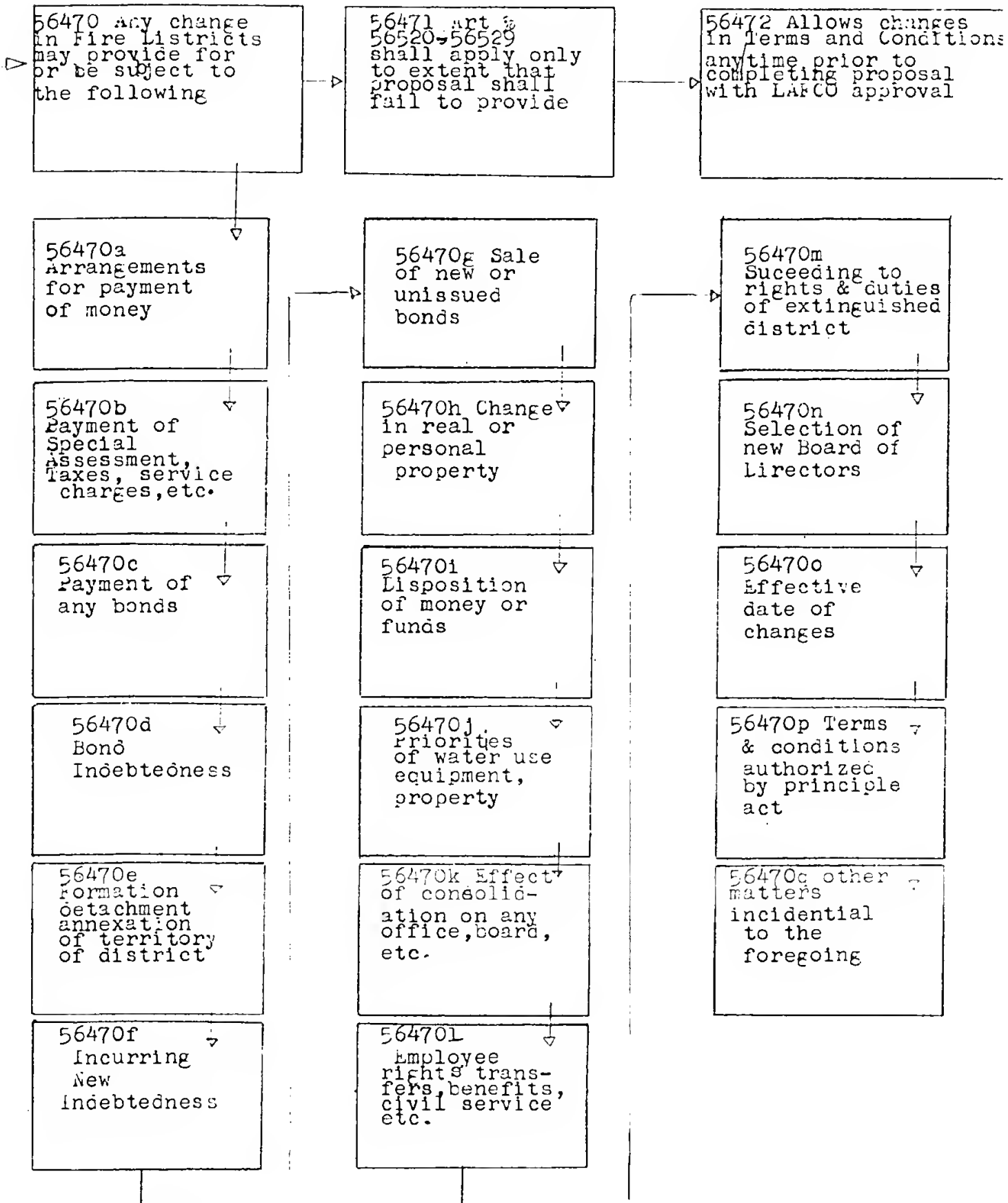




CONSOLIDATION
Election Procedure



General Terms and Conditions



CONSOLIDATION
Specific Terms and Conditions

**see note
on 5B



56520
Succession
to power

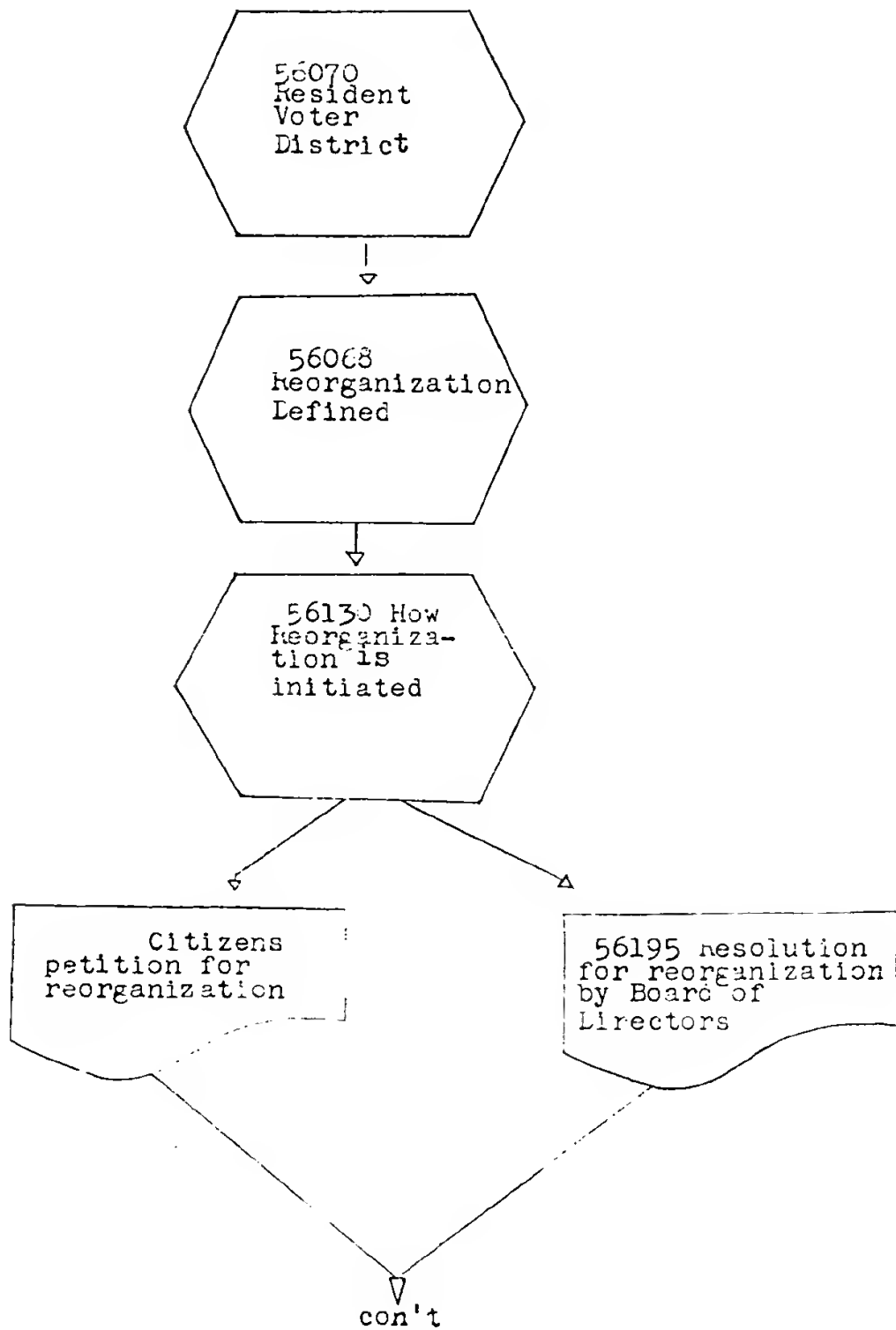


56521 Free
use of property
of predecessor
district



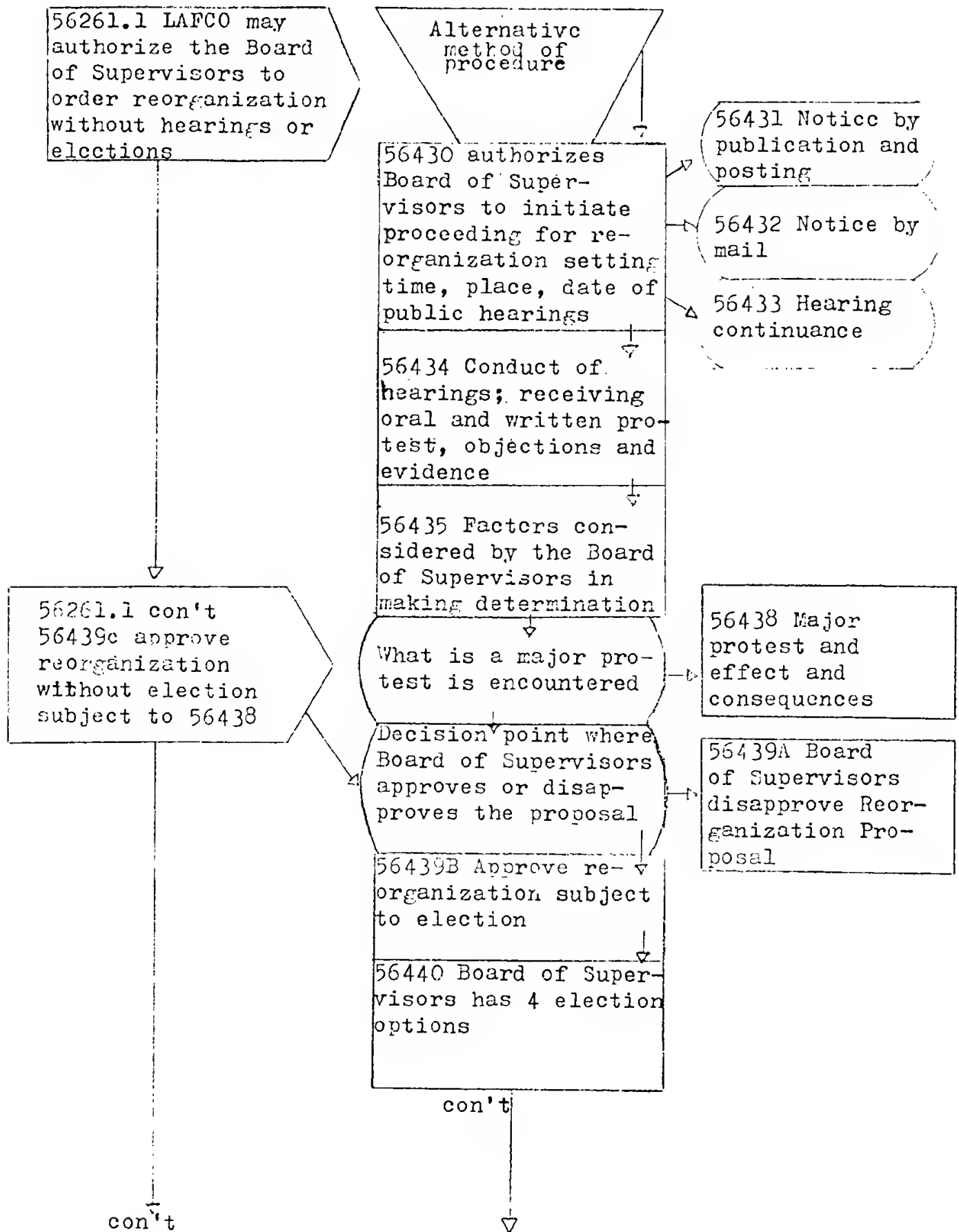
56522
Liability on
bonds and
obligations

now change is initiated



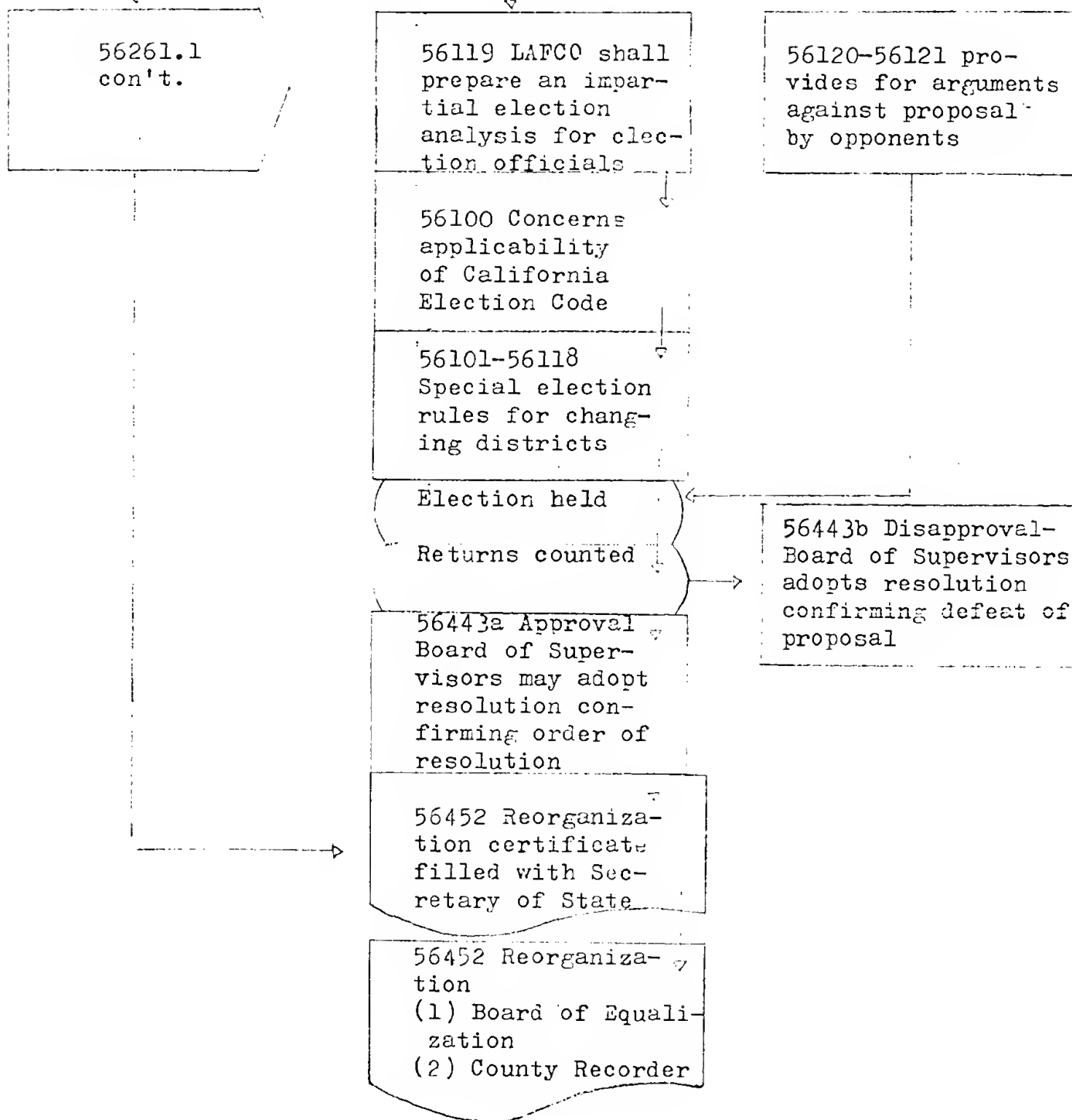
REORGANIZATION

Proceedings by the Board of Supervisors



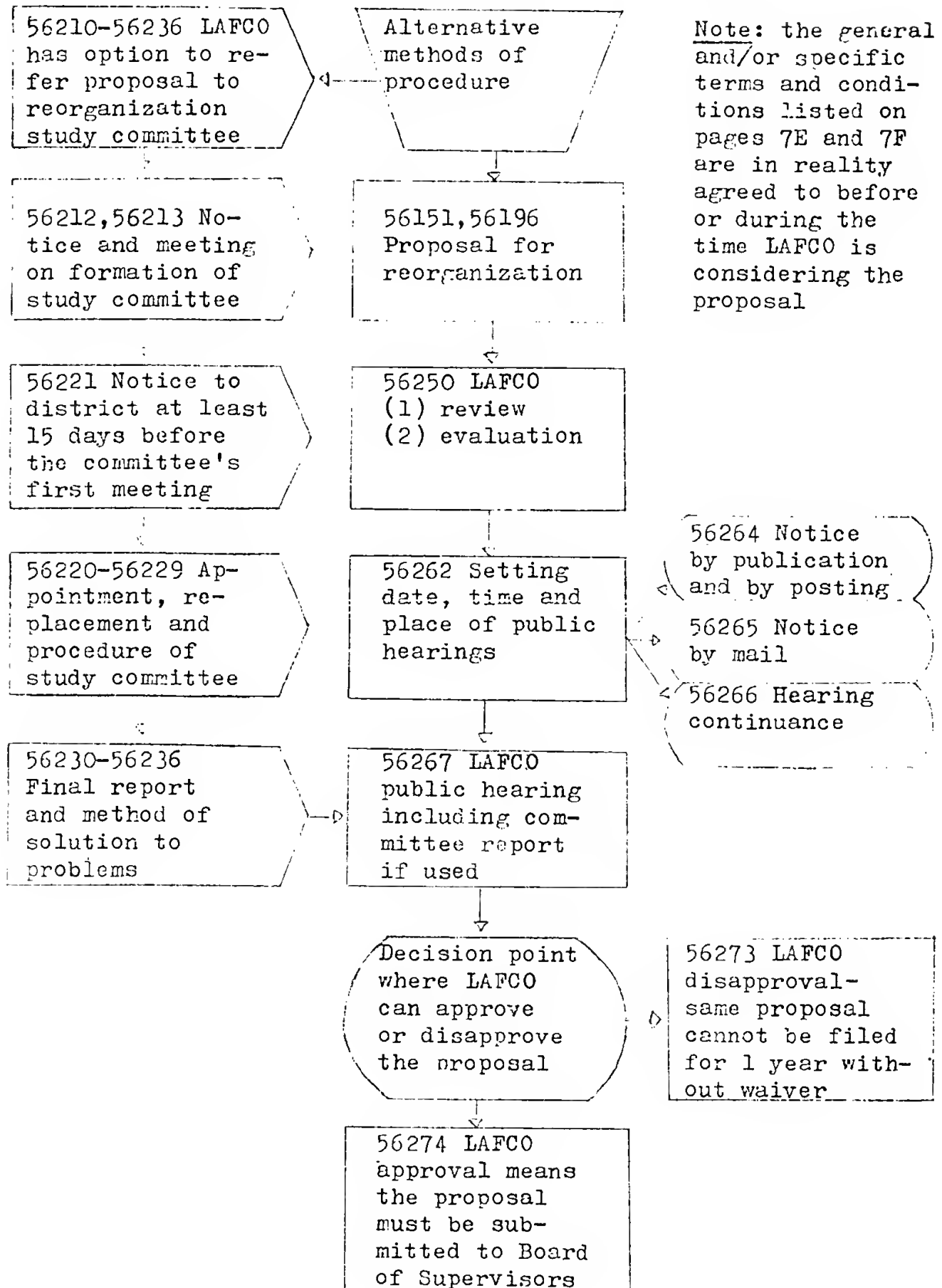
REORGANIZATION

Election Procedure

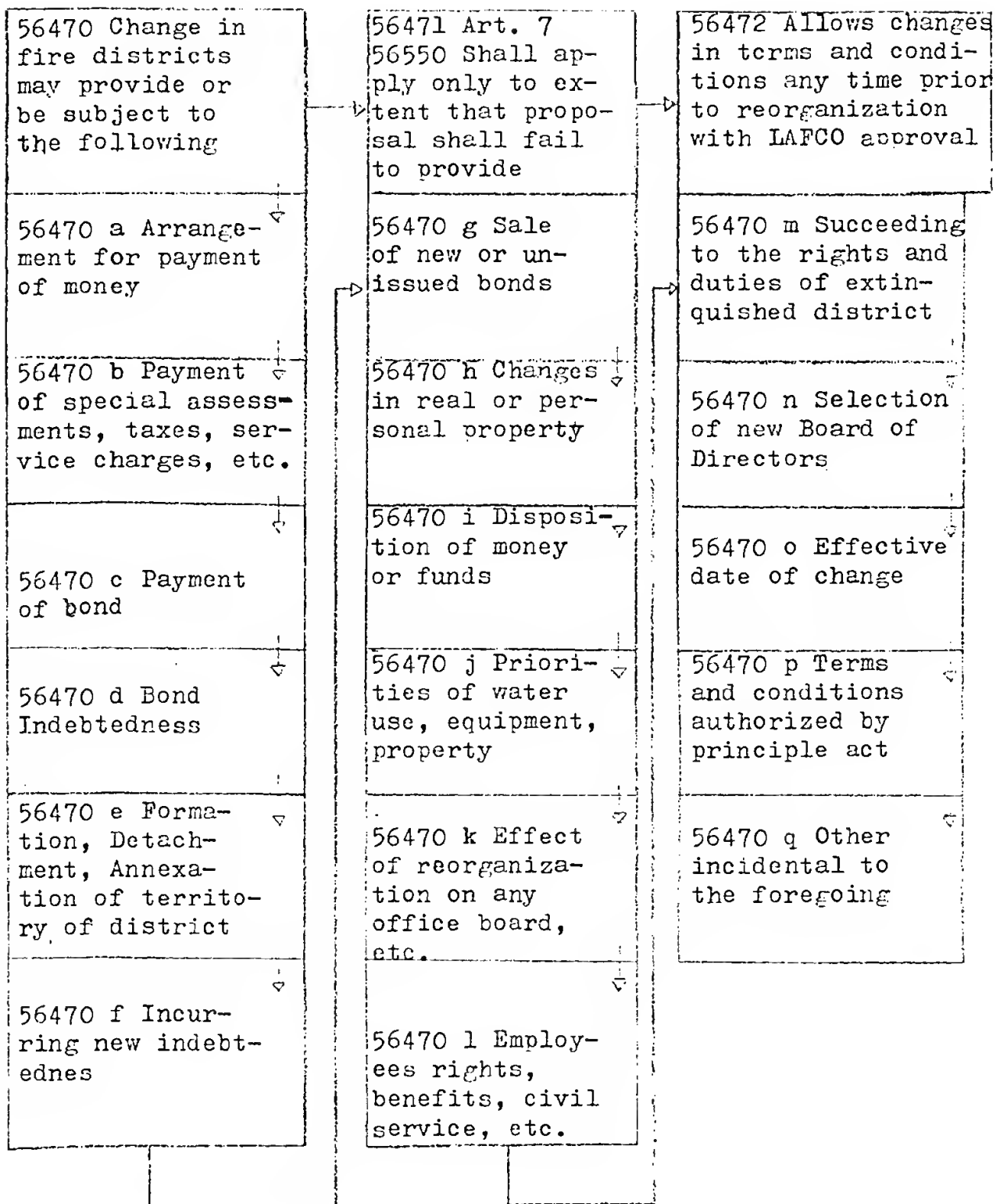


REORGANIZATION

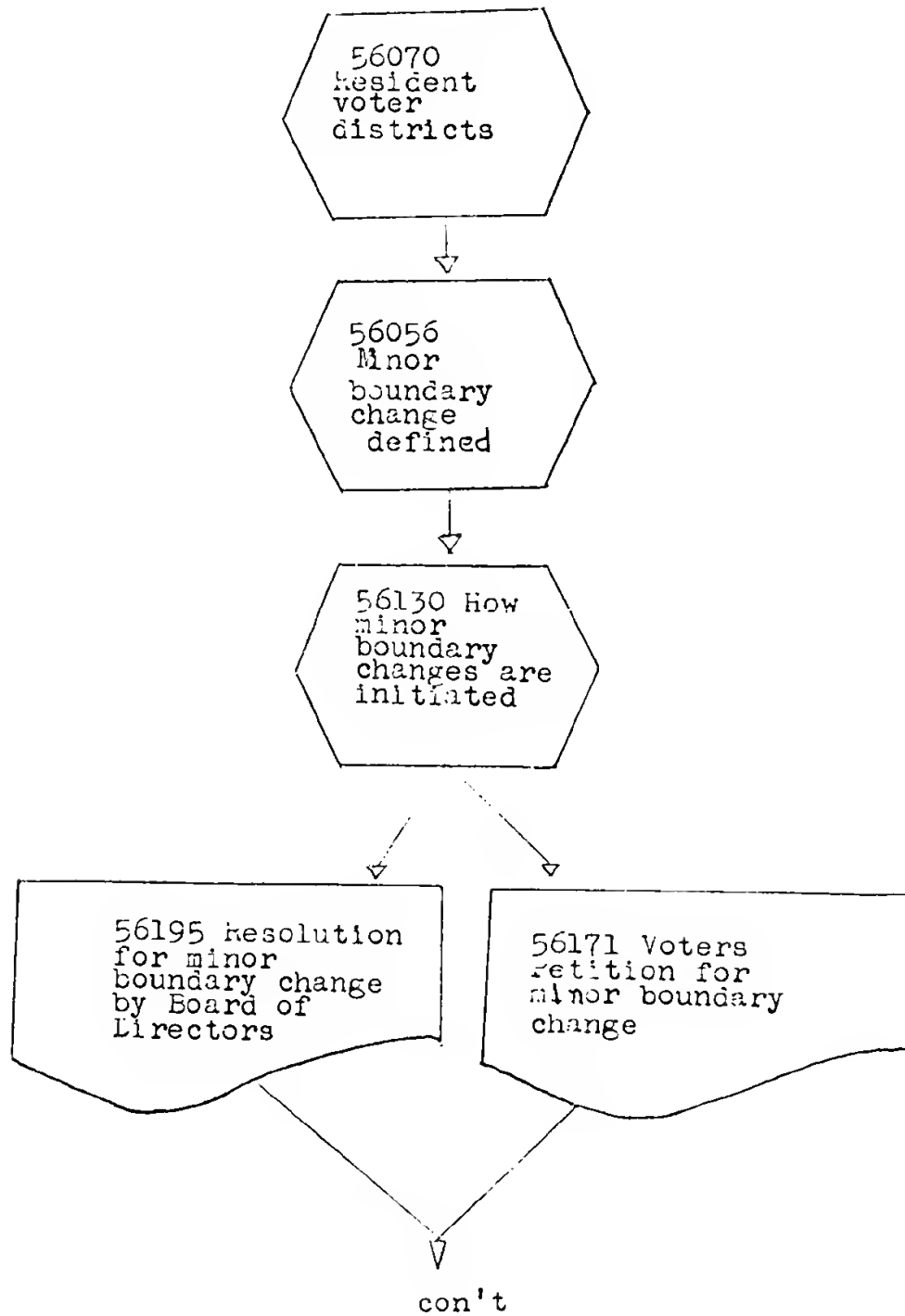
Local Agency Formation Commission (LAFCO) Procedure

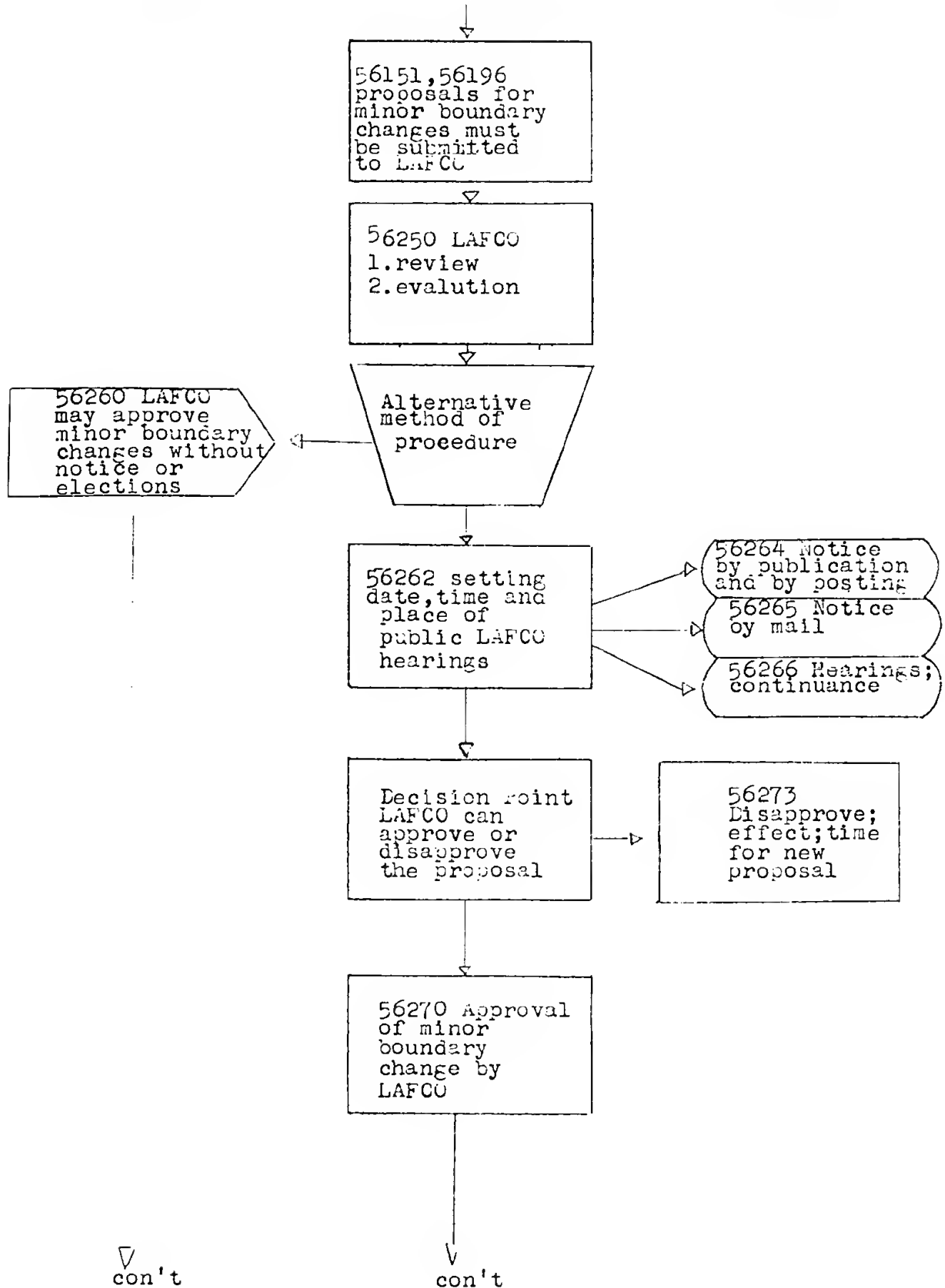


REORGANIZATION
General Terms and Conditions



MINOR BOUNDARY CHANGES
How change is initiated





MINOR BOUNDARY CHANGES

↓

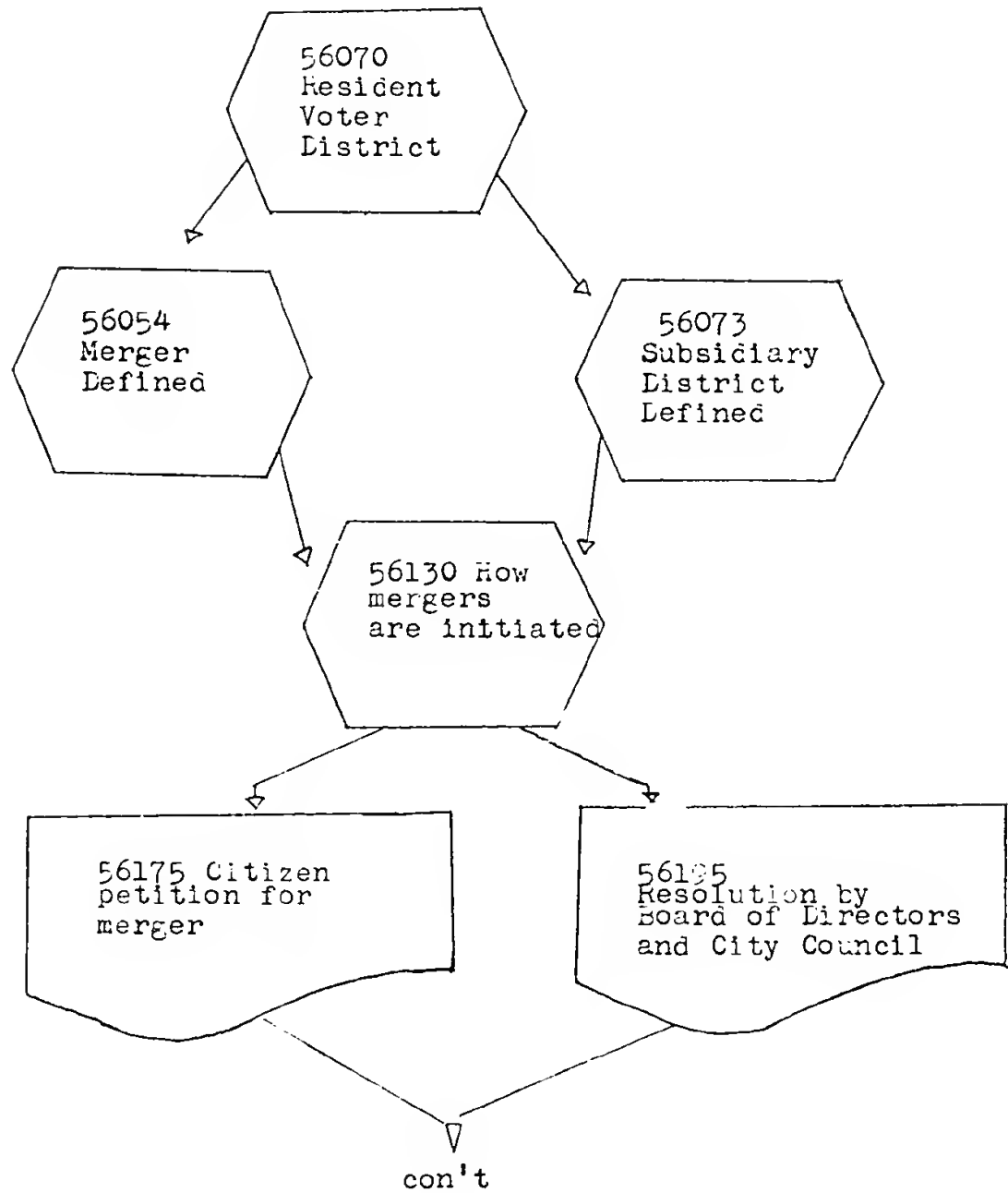
56350 Board of
Directors may order
minor boundary
change without
notice or hearings

↓

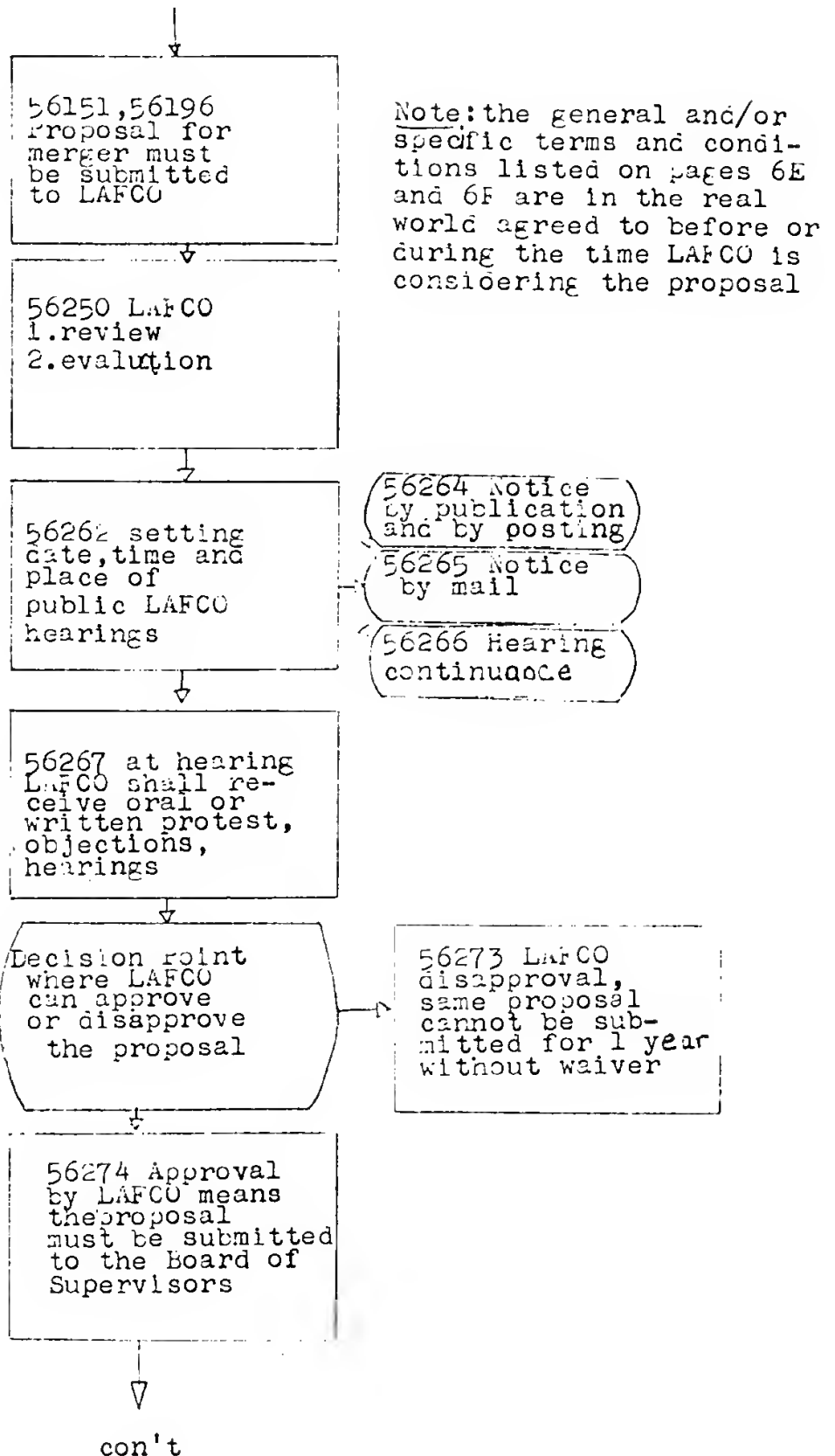
56351 Board of
Directors may order
minor boundary
change without an
election

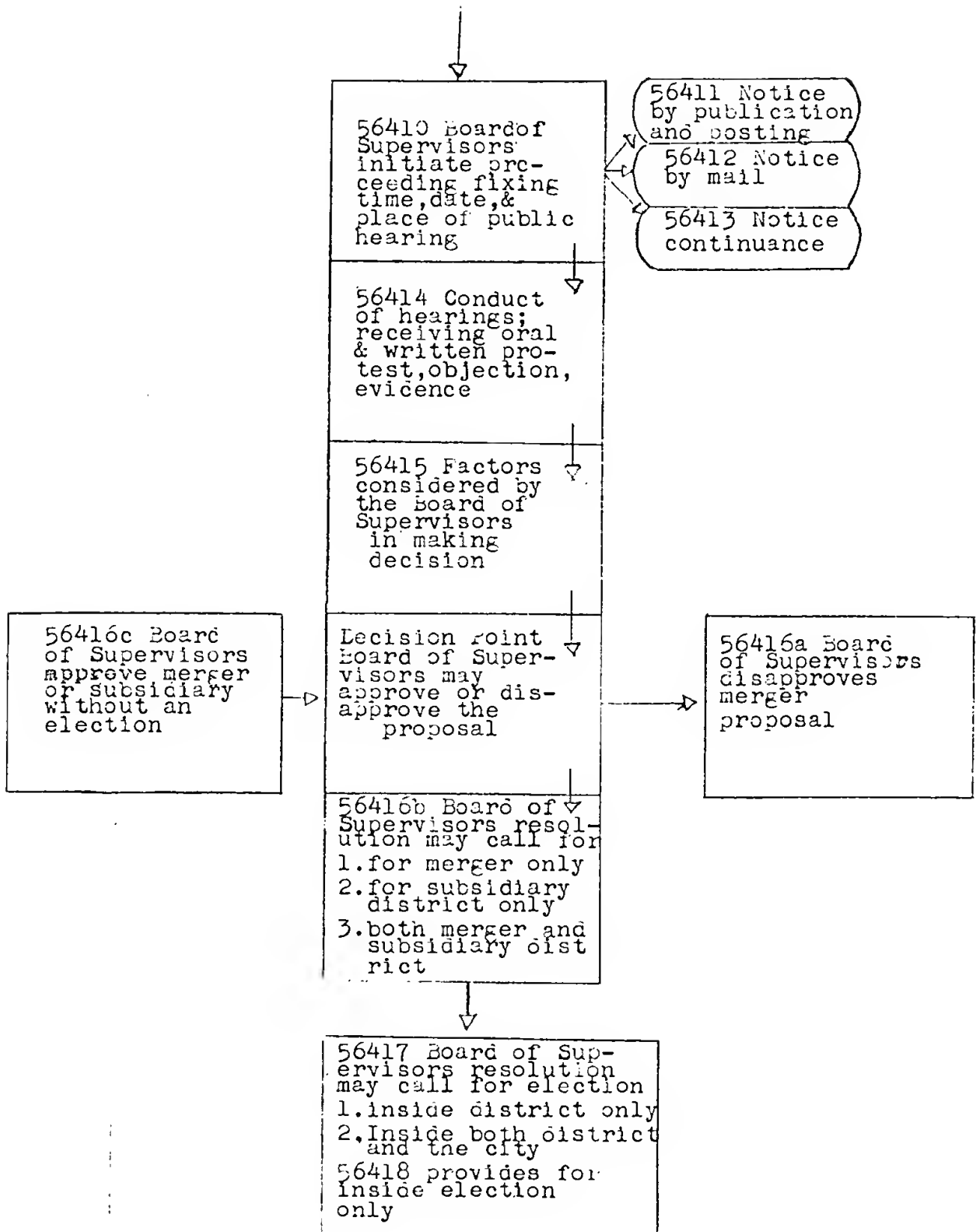
Note: Minor boundary changes may be ordered without notice, hearings or elections if all owners of property in the territory involved agree to the change. If all owners do not agree, the proposal may become an annexation or detachment and the provisions starting with 56310 would need to be followed.

MERGER
How change is initiated



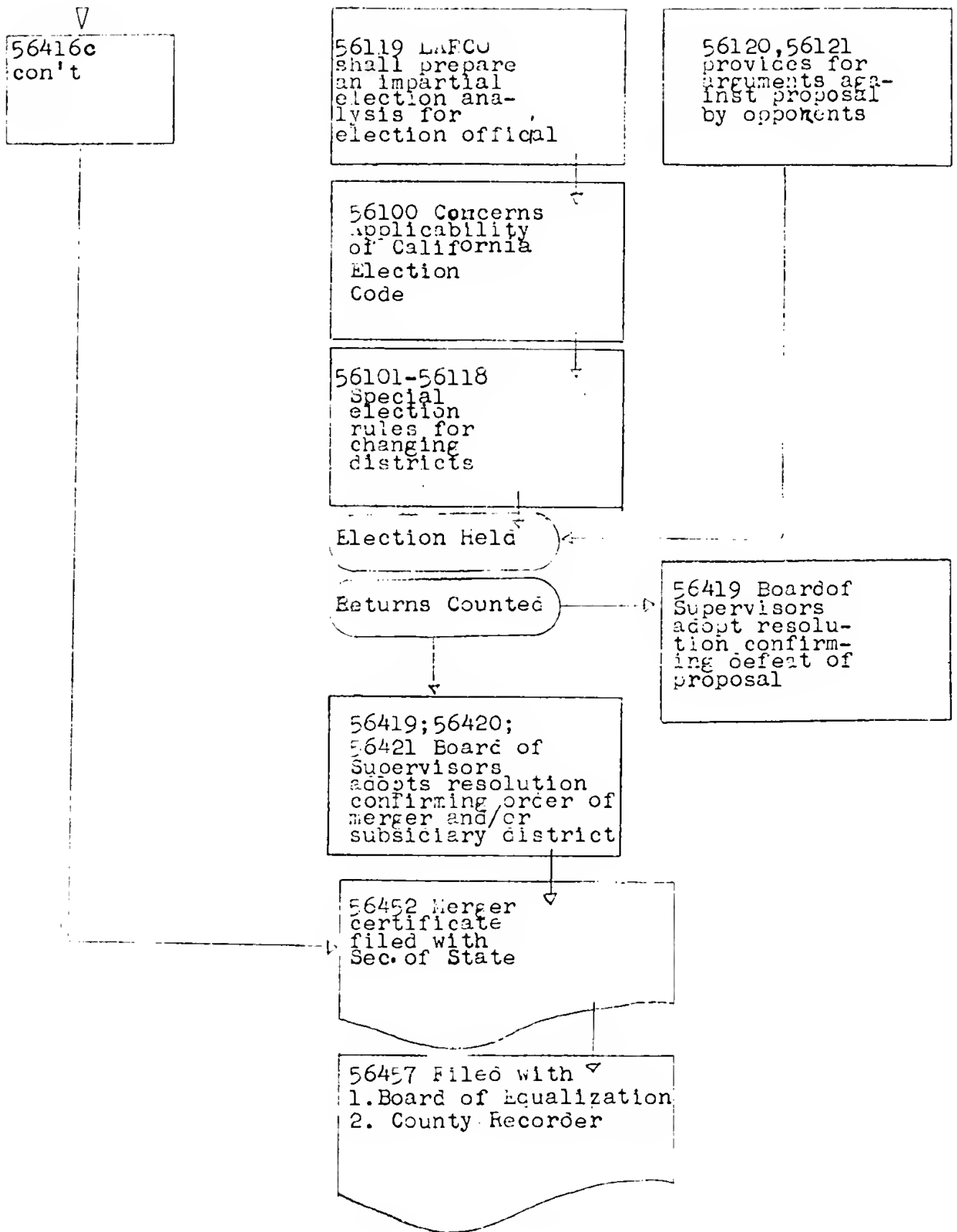
MERGER
Local Agency Formation Commission (LAFCO) Procedure

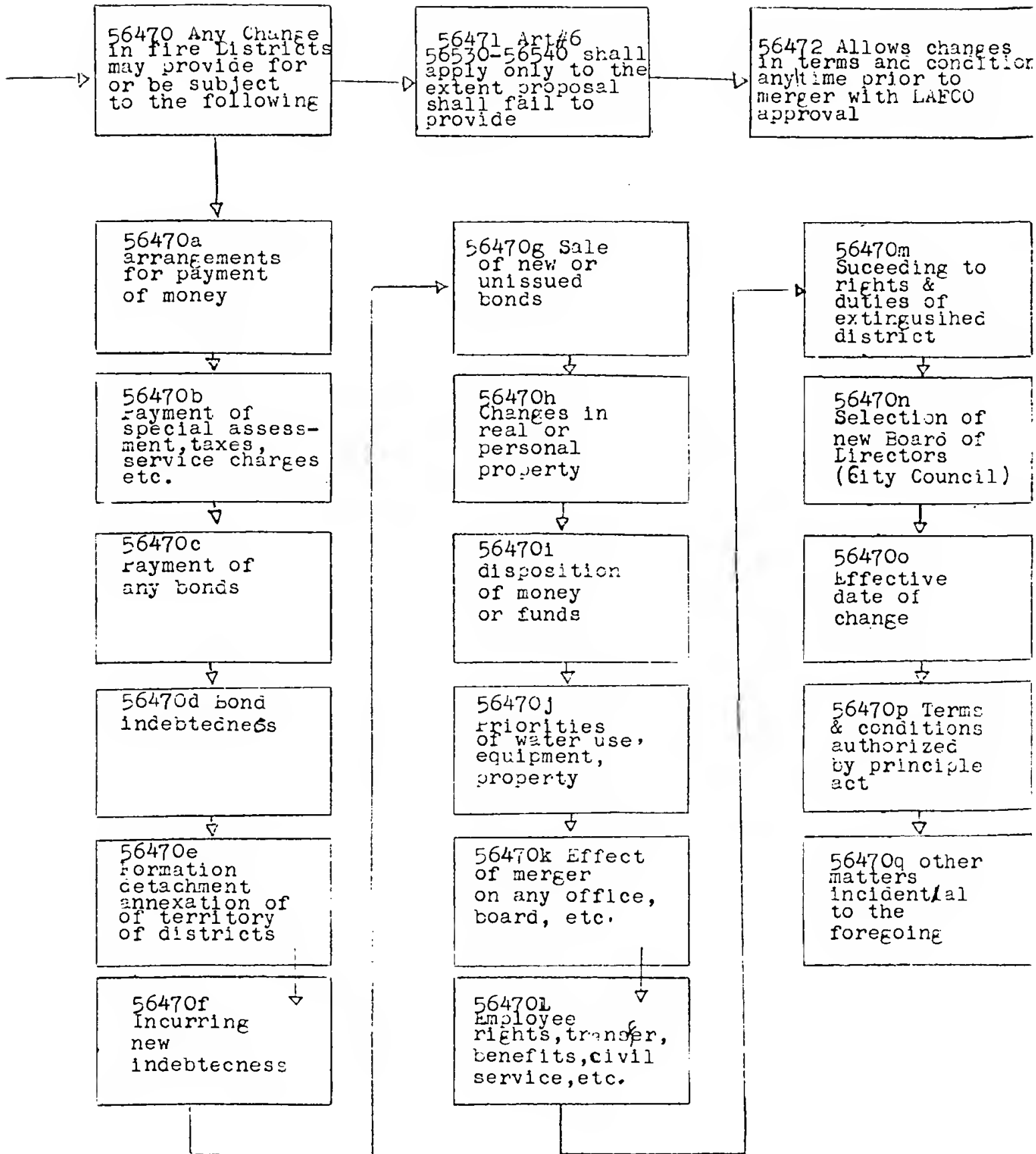


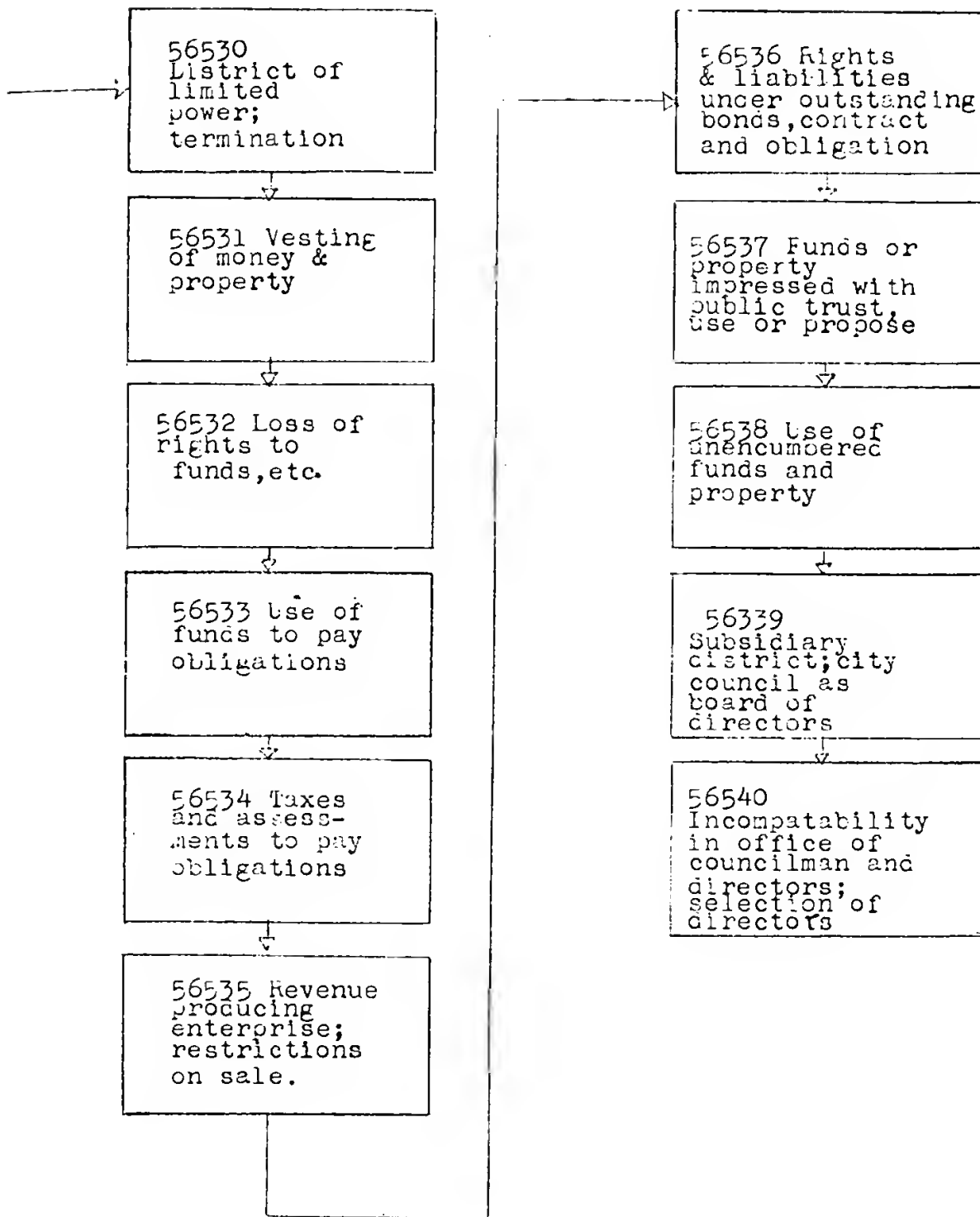


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JOINT EXERCISE OF POWERS

The old adage about there being more than one way to skin a cat was never truer than in the case of California local government. There are more than 2,500 special districts in California and there is one main reason for their popularity. The California Constitution Section 18, Article XI, forbids the state, counties or cities from incurring any indebtedness that is not covered by current revenues unless 2/3 of the voters approve the expenditures. The California Supreme Court has consistently held that Section 18 of Article XI does not apply to special districts. What this means is that if, for example, a city wanted to construct a costly sanitation district that it could not finance from current revenues and if the interested parties believed that a 2/3 vote was not possible, then the special district is the obvious alternative. This is not to imply that this result is necessarily bad; it simply is intended to show that the financial limitation is not so real after all. There are arguments about the extra cost involved in this situation, due to the creation of extra boards and other structures but since no figures are available on this matter we will not explore this topic.

But there is still another way for the state, counties and cities to avoid the constitutional debt limitation. The Joint Exercise of Powers Act, originally enacted in 1921 and found in Section 6500 to 6515 of the Government Code provides "If authorized by their legislative or other governing bodies, two or more public agencies by agreement may jointly exercise any power common to the

contracting parties ..."

What makes this all interesting law is that the California Supreme Court, starting with the case City and County of San Francisco v. Boyle, 191 Cal. 172, 215 P. 549 (1923) has held that Section 18 of Article XI does not apply to Joint Powers Agreements. This indirectly removed the debt limitation as it applies to counties and cities, if a Joint Powers Agreements is involved.

What is a Joint Powers Agreement? Basically, it is a contract whereby the parties (public entities) agree to do something, ranging from agreeing to provide mutual assistance in case of fire to building a sports stadium (e.g., the San Diego Stadium). The only practical limitation of the contracting power is found in other parts of the constitution or statutes, such as entering into business for profit.

Sections 6500 through 6515 place certain restrictions and require that commissions formed under the Joint Powers Agreement follow certain procedures; for example, the agreement "shall provide for strict accountability of all funds and report of all receipts and disbursements."

This is an oversimplification of what is a very complex subject. It is merely intended to give the reader some notion of what Joint Powers Agreement's are and how they came about.

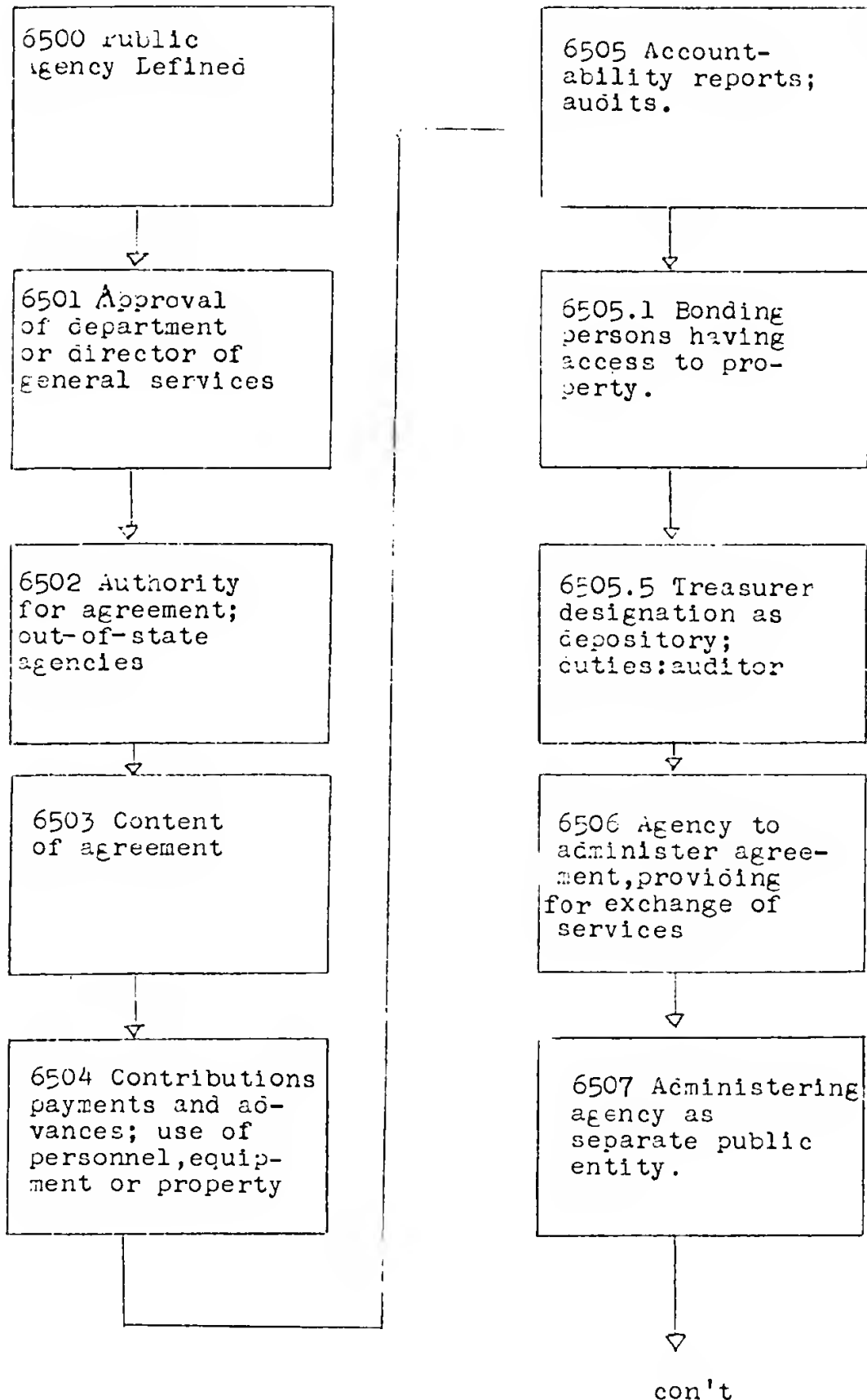
Another subject that should be mentioned, but which is not covered in detail here are Sections 6540 - 6578 of the Government Code entitled, "Power to Issue Revenue Bonds". Many of the joint ventures that public entities create involve the raising of funds. These sections of the code set forth certain procedures that must be

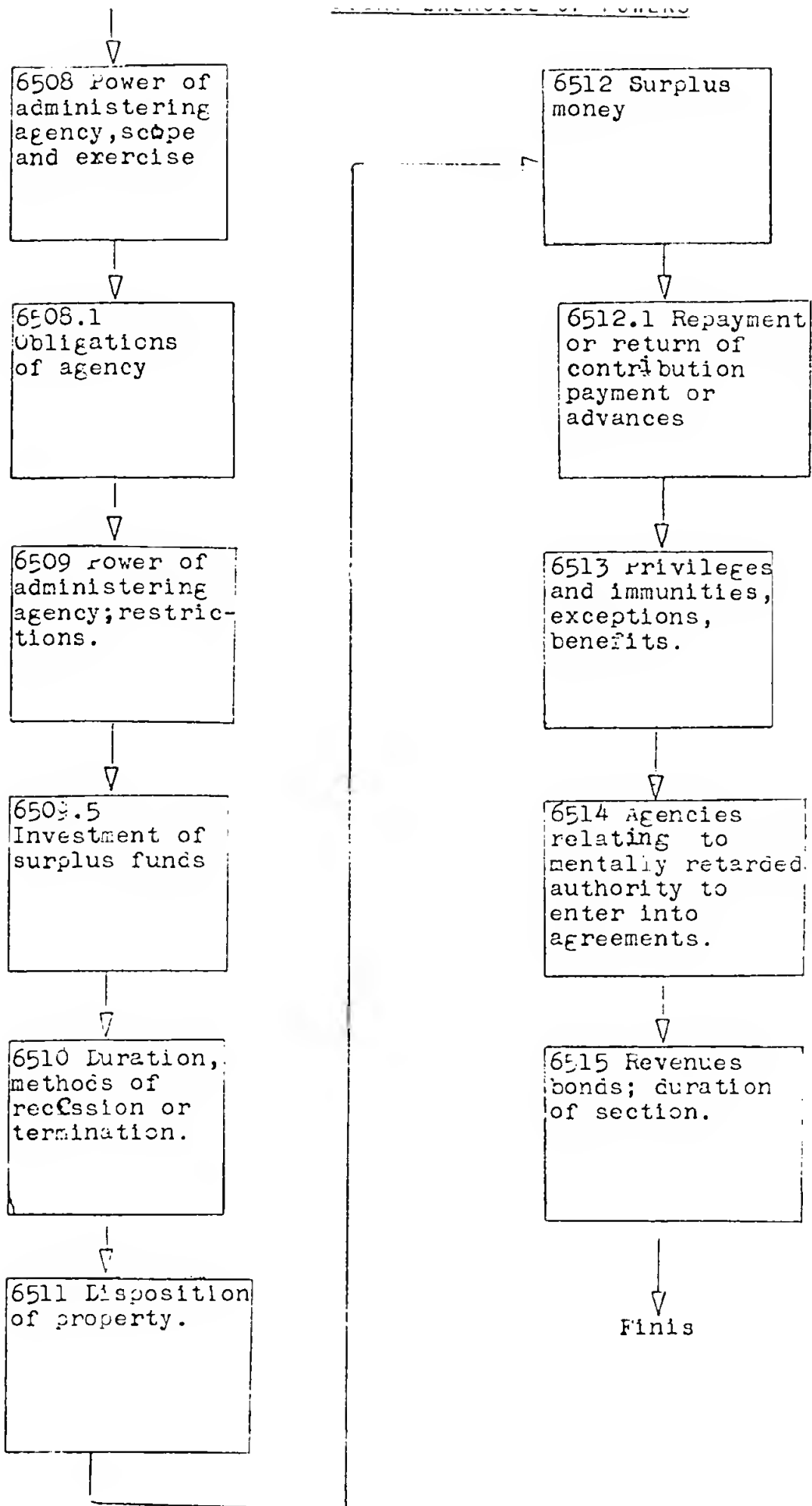
followed by public entities when using revenue bonds, a source of funds for projects formed under the Joint Powers Agreement. The San Diego Stadium is an example of this type of funding.

The Flowchart that follows lists the procedures set forth in the code for Joint Powers Agreement. Although the procedures do not follow a required flow as the District Reorganization Act does we have set it out in this flow to facilitate understanding. Again we want to advise individuals reading this report to consult the code and the latest court decisions before action in this area is taken.

JOINT EXERCISE OF POWERS

(start)





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